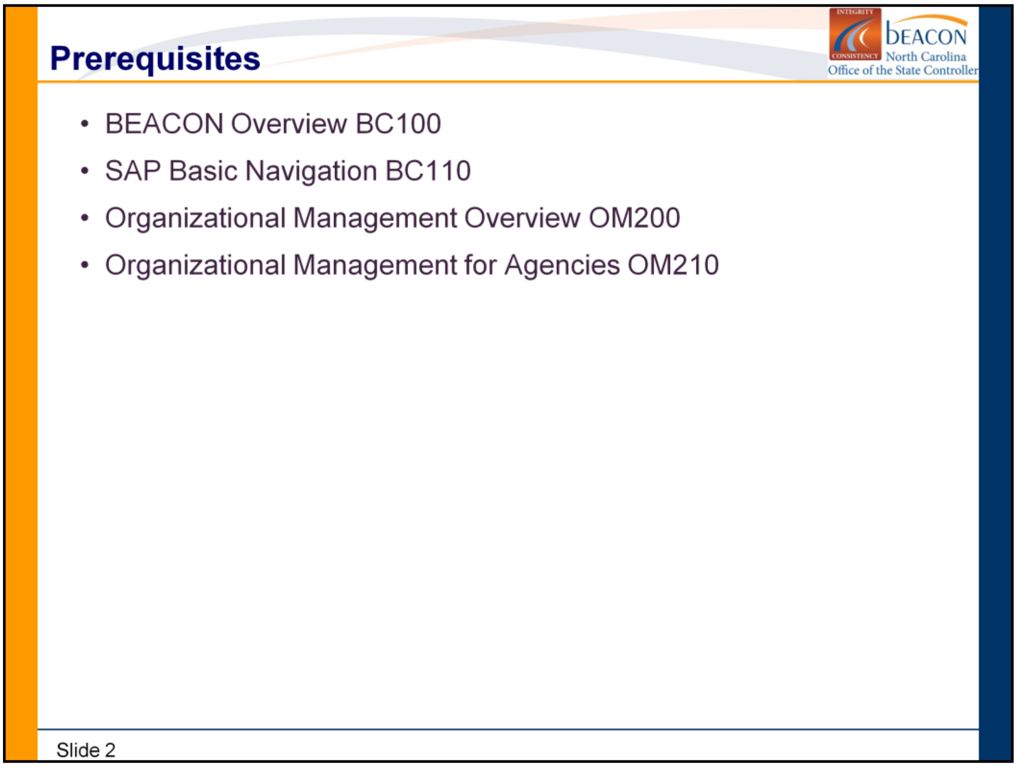

SAP Training
BEACON
North Carolina
Office of the State Controller
Agency Funding
Approval
OM250
Slide 1

Notes:



Instructor Notes:

Participants should have these prerequisites completed BEFORE attending this course.

Notes:

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

Also ensure that others have a quality training experience. Please turn your cell phones off during class so others are not disturbed.

Notes:

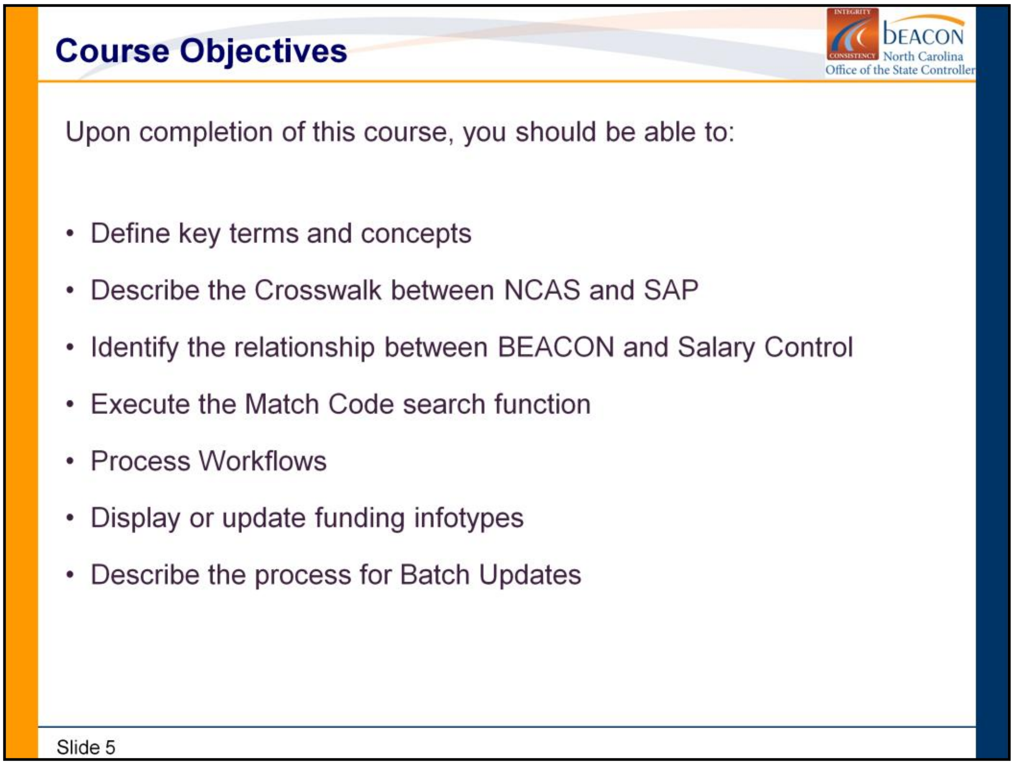
Course Map – Agency Funding Approval

BEACON North Carolina Office of the State Controller

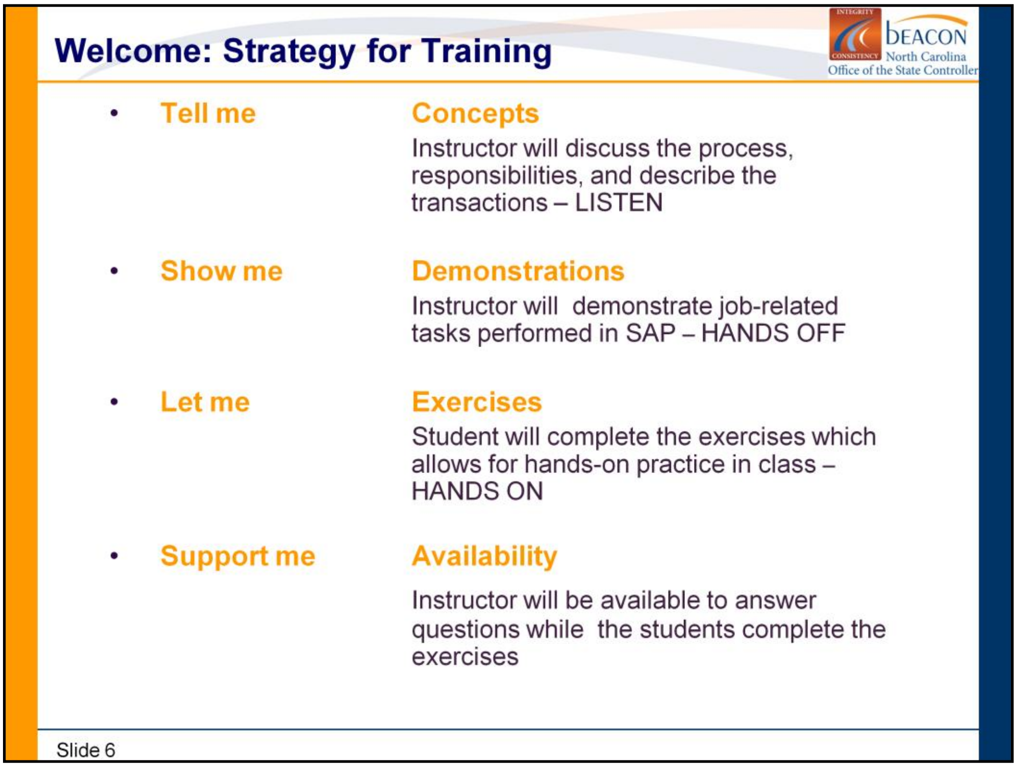
- Lesson 1: Terms and Concepts
- Lesson 2: Workflow
- Lesson 3: Maintain Position (PO13)
- Lesson 4: Mass Updates
- Lesson 5: Course Review

Slide 4

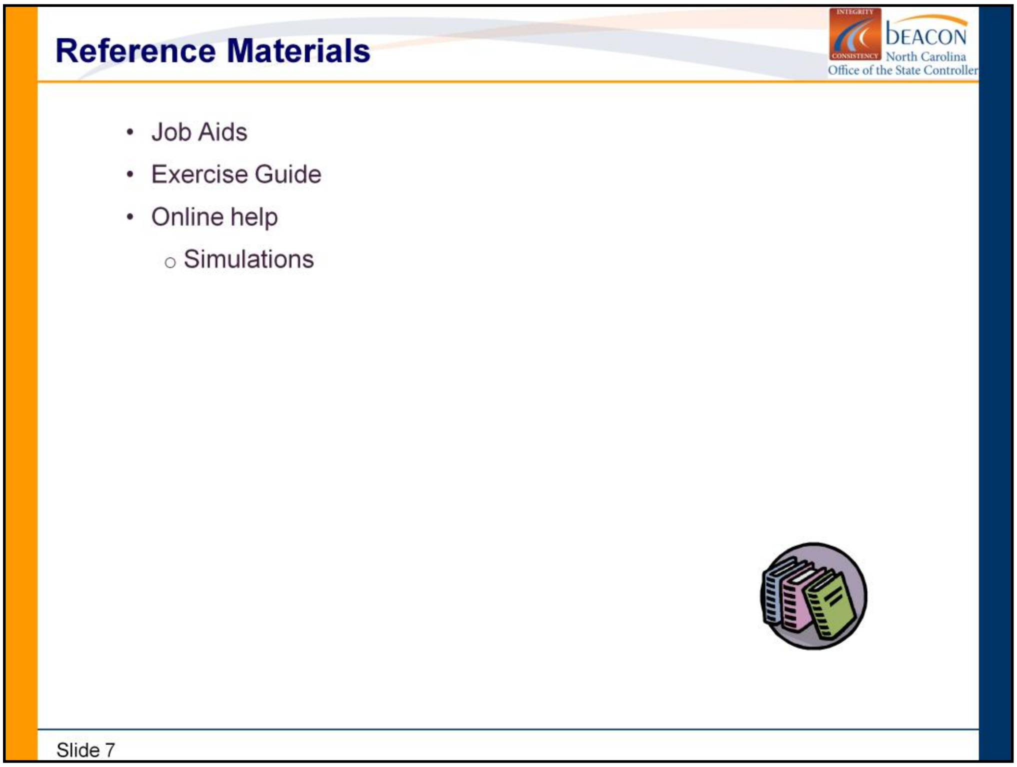
Notes:


Course Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this course, you should be able to:
• Define key terms and concepts
• Describe the Crosswalk between NCAS and SAP
• Identify the relationship between BEACON and Salary Control
• Execute the Match Code search function
• Process Workflows
• Display or update funding infotypes
• Describe the process for Batch Updates
Slide 5

Notes:


Welcome: Strategy for Training
BEACON
North Carolina
Office of the State Controller
• Tell me
Concepts
Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
• Show me
Demonstrations
Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF
• Let me
Exercises
Student will complete the exercises which allows for hands-on practice in class – HANDS ON
• Support me
Availability
Instructor will be available to answer questions while the students complete the exercises
Slide 6

Notes:



Notes:

Job Aids

In addition to the Student Guide, these quick references are available online via the BEACON University web site:

- Position Actions Descriptions
- OM Infotypes Descriptions
- Field Definitions for OM Position Actions

Exercise Guide

The position and job data in this course are representative of "real" data in your work environment. However, the position action scenarios and exercises included in this course have been created solely for the purpose of training.

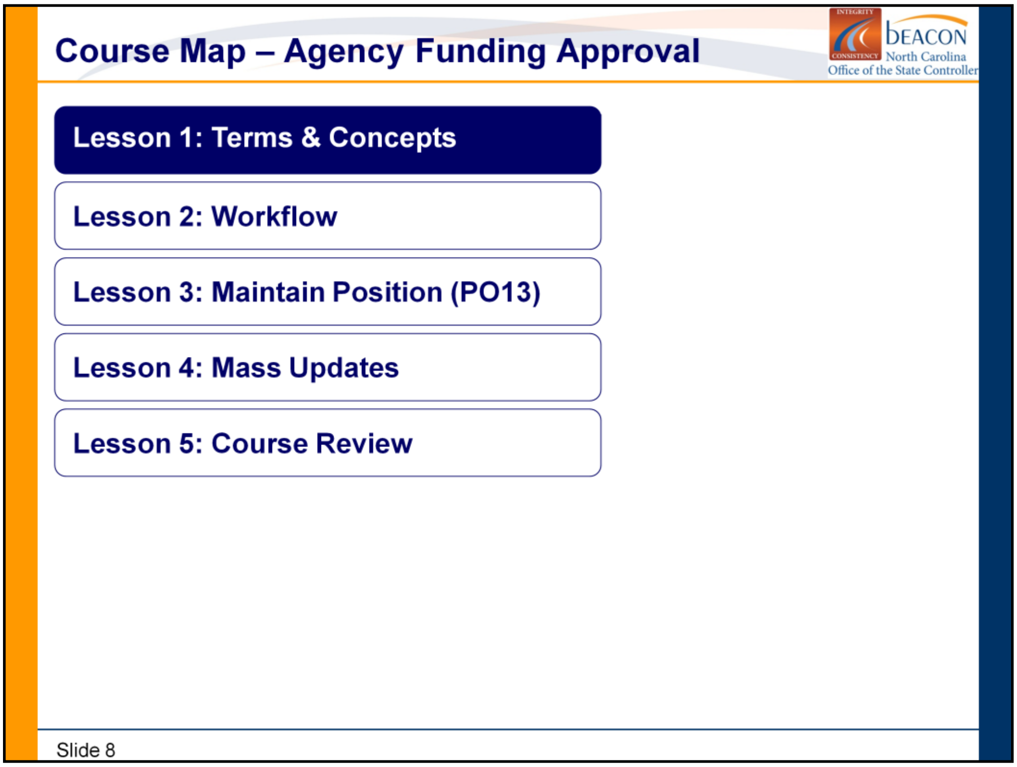
Online Help

Online Help can be accessed in two ways:

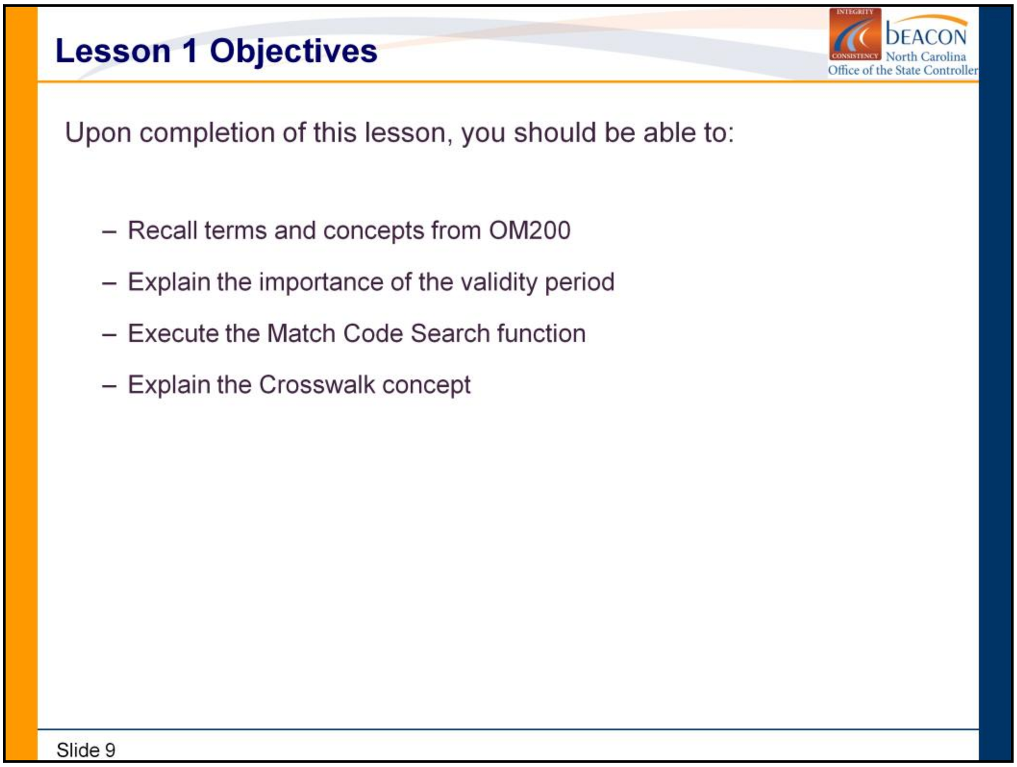
a. Beacon University

b. Help menu in BEACON SAP (Help > BEACON Help)

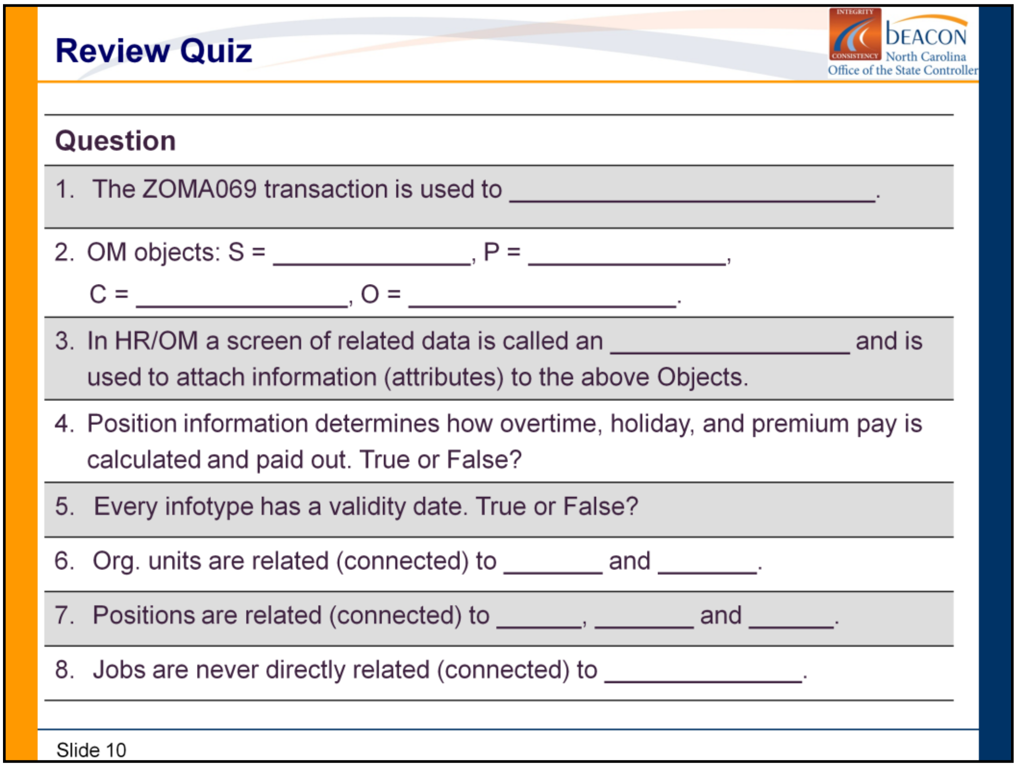
Either method provides step-by-step procedures (also called Business Process Procedures or BPPs). In addition, you can link to simulations (although not all procedures have simulations).


Course Map – Agency Funding Approval
BEACON
North Carolina
Office of the State Controller
Lesson 1: Terms & Concepts
Lesson 2: Workflow
Lesson 3: Maintain Position (PO13)
Lesson 4: Mass Updates
Lesson 5: Course Review
Slide 8

Notes:


Lesson 1 Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
– Recall terms and concepts from OM200
– Explain the importance of the validity period
– Execute the Match Code Search function
– Explain the Crosswalk concept
Slide 9

Notes:


Review Quiz
BEACON North Carolina Office of the State Controller
Question
1. The ZOMA069 transaction is used to ____________________________.
2. OM objects: S = _______________, P = _______________,
C = ________________, O = ____________________.
3. In HR/OM a screen of related data is called an __________________ and is used to attach information (attributes) to the above Objects.
4. Position information determines how overtime, holiday, and premium pay is calculated and paid out. True or False?
5. Every infotype has a validity date. True or False?
6. Org. units are related (connected) to _______ and _______.
7. Positions are related (connected) to ______, _______ and ______.
8. Jobs are never directly related (connected) to _______________.
Slide 10

Notes:

Review Quiz

BEACON North Carolina Office of the State Controller

Question

9. A validity period consists of a ________ date and an ________ date.

10. The command field allows you to jump directly to a ___________________. (Hint: PO13 or PPOSE.)

11. You should save time by only hitting Save and not Enter first. True or False?

12. These icons mean? ________ __________ ___________.

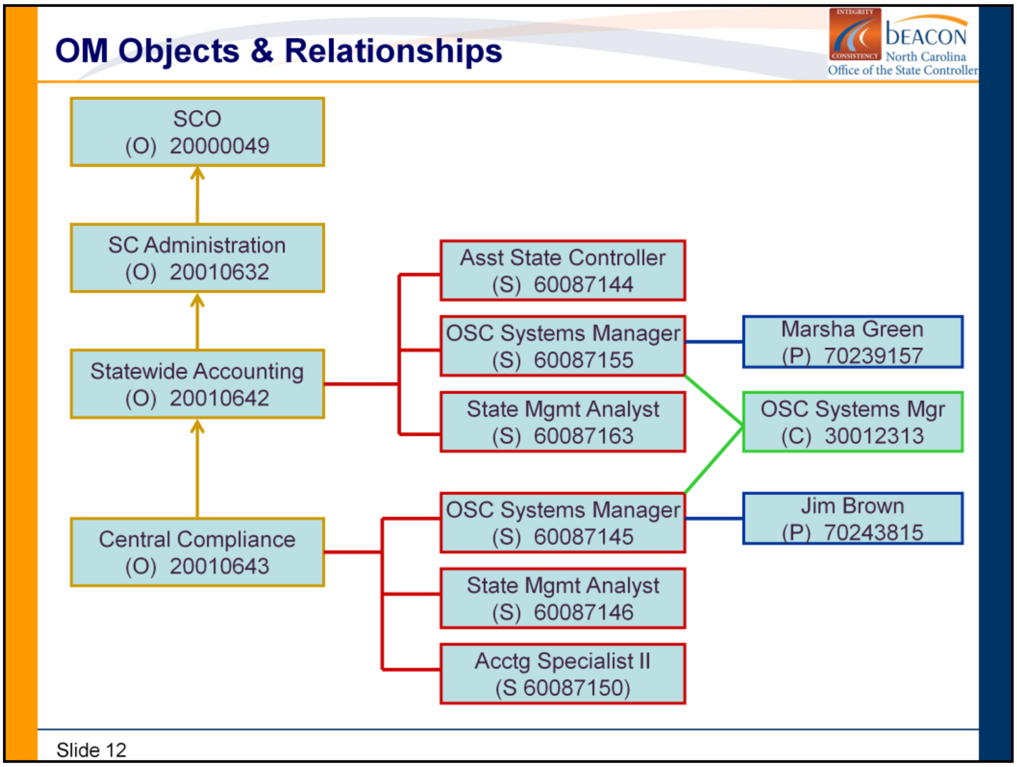
13. Which of the above icons is never used?

14. In SAP the NCAS company code is _______. Only DOT and Employment Security Commission (ESC) belong to company code _______.

15. Each of these objects start with a different number. What are they? Org. units ____, Positions ____, Jobs ____.

Slide 11

Notes:



Notes:

The primary Objects in organizational management are:

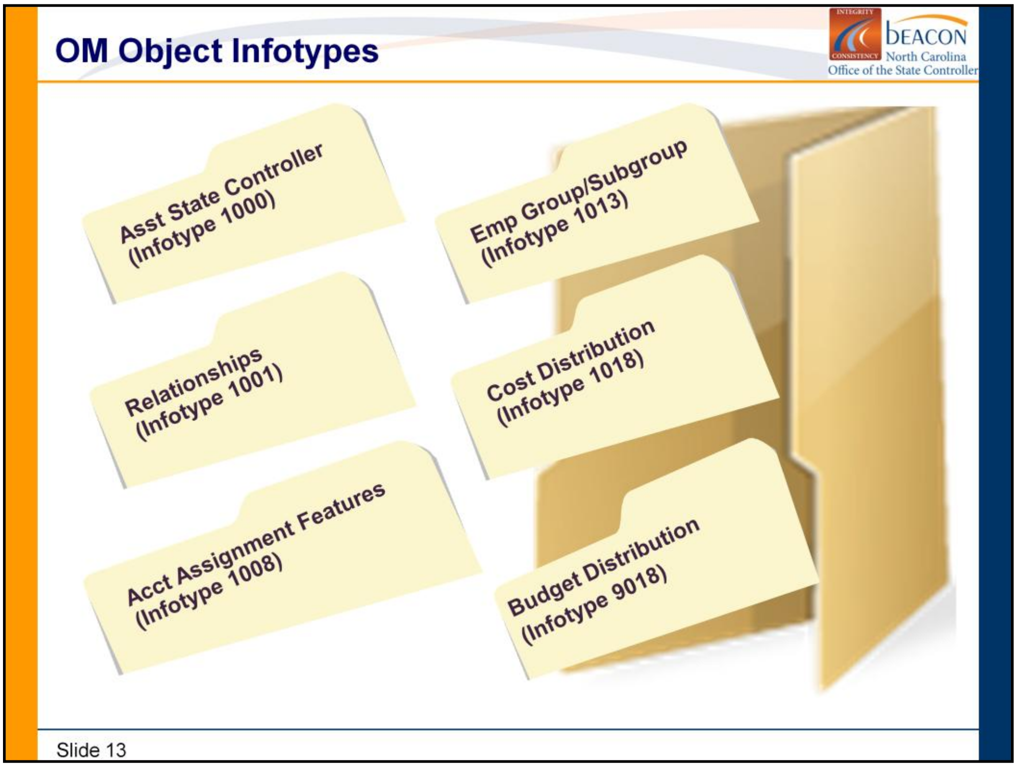
- Organizational Unit (O)
- Job (C)
- Position (S)
- Person (P)

Each of these Objects have Infotypes which track:

- Attributes (tracks information such as funding, employee group/sub-group, etc.)
- Relationships (connects one object to another). All Objects in Organizational Management have a relationship infotype.

Organizational (Org) Units are related to Org Units in a hierarchal structure, just like any business organizational chart. As shown in the example above: Central Compliance (20010643) reports to Statewide Accounting (20010642) which reports to SC Administration (20010632) which reports to SCO (20000049).

Positions are related to Org Units and Jobs. In the above example: Central Compliance (20010643) has the positions: OSC Systems Manager (60087145), State Management Analyst (60087146), and Accounting Specialist II (60087150). Statewide Accounting Org Unit (20010642) has the positions: Asst State Controller (60087144), OSC Systems Manager (60087155), and State Management Analyst (60087163). Both OSC Systems Manager positions (60087145 and 60087155) are created from Job OSC Systems Manager (30012313). Position 600087145 is held by Jim Brown (70243815) and Position 60087155 is held by Marsha Green (70239157).

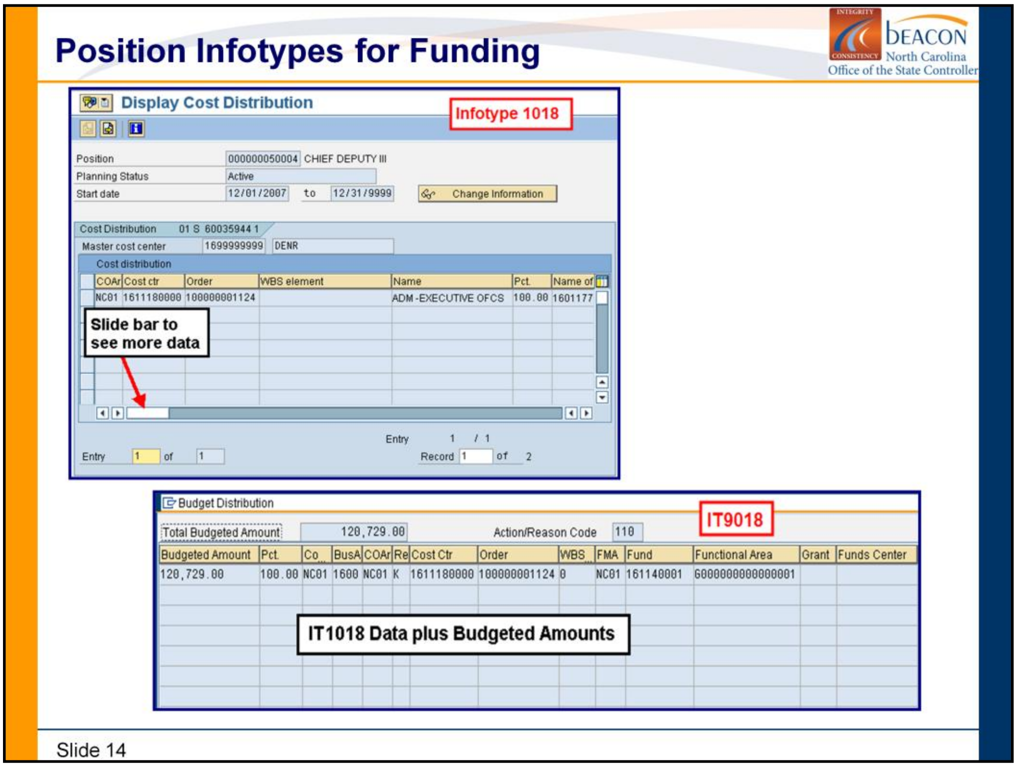


Infotypes are screens of information about a position. Each infotype has a name and numerical code (at the current time, the infotype codes shown here do not display on the infotype screen). As illustrated above, infotypes are similar to grouping pieces of information together into a single file folder. A position has several infotypes as listed below. :

Notes:

- IT1000 Object (holds short and long name)
- IT1001 Relationships (one for each relation such as S-O, S-C, S-P)
- IT1008 Acct Assignment Features (defines the Company code, Personnel area/Subarea, etc.)
- IT1011 Full Time Equivalent (defines the hours per day, week, month, year & percentage)
- IT1013 Employee Group/Subgroup (defines the employee group and subgroup)
- IT1018 Cost Distribution (used for financial information such as cost center, fund, functional area, etc.)
- IT9018 Budget Distribution (salary and reason a revision is being made)

As a Funding Approver, you will work with two infotypes that hold the position funding information: Cost Distribution and Budget Distribution. These infotypes are sometimes referred to as 1018 and 9018 respectively.



You will access the infotypes via either your Inbox (to process a position e ZOMA069 Workflow or a personnel ZPAA076 Workflow) or via PO13 Maintain Position (because the process did not require Workflow). Regardless of the way in which you access the infotypes, you will follow the same process to update funding information.

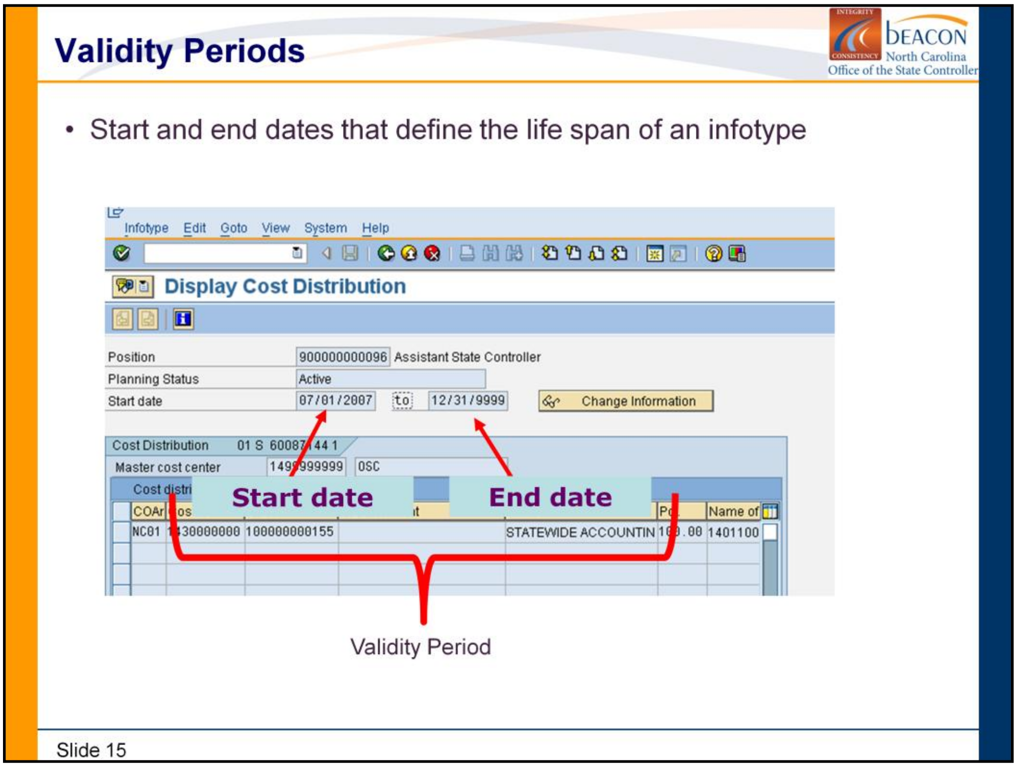
Notes:

Cost Distribution (IT1018) includes the Cost Center, internal order and fund information. The relevant fields are:

- COAr – Controlling Area (Always NC01)
- Cost ctr – Cost Center
- Order – Internal Order (the description field currently holds NCAS company and center). **NOTE:** Since DOT has SAP Financials, their Internal Order numbers have meaning and are used to track specific costs.
- Pct – Percent (that applies to applicable line)
- Fund – Fund
- Functional Area (defaults – 16 digits, always G000000000000001)

The remaining fields automatically populate with a description based on the entries made in the fields listed above. The "Name of Auxiliary Account" field displays the NCAS Company and Center value.

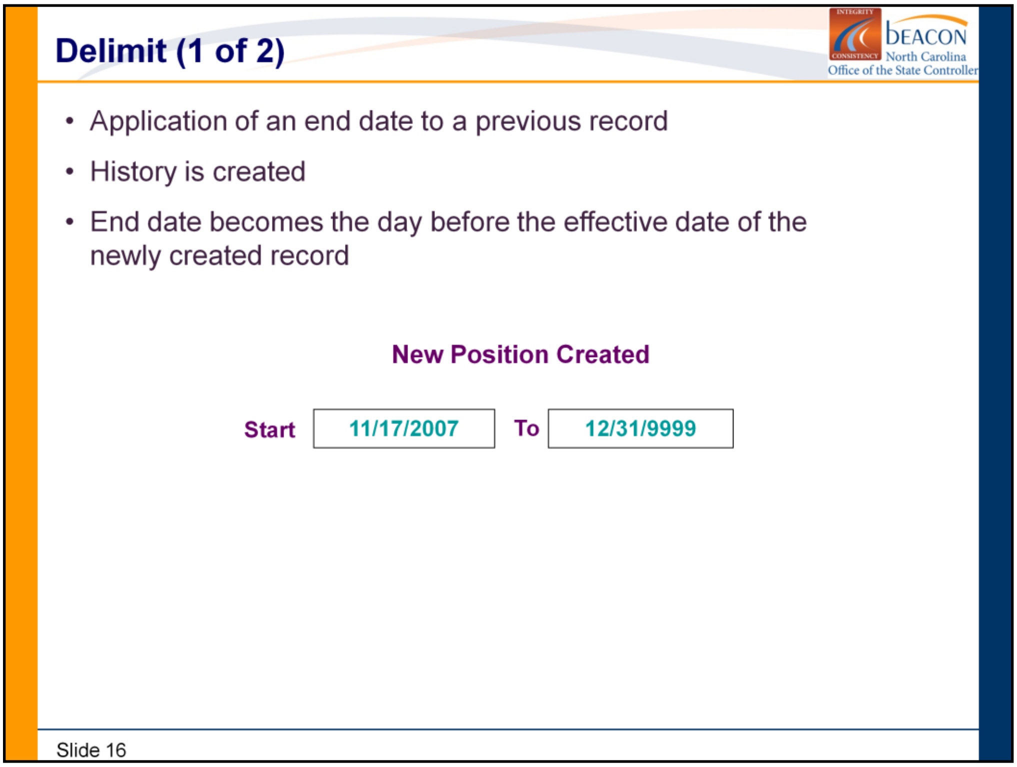
Budget (IT9018) includes the budgetary amount for the position as well as the reason a change is being made.



All infotypes must have an effective (start) date and an ending date, which is called the **validity period**. Although you will always know the start date of a record, you usually won't know the end date. For example, if a position is created or funding is revised today, the end date for either of those records is unknown. To accommodate for that uncertainty, Beacon SAP allocates an end date of December 31, 9999 (sometimes referred to as the end of time) for all current records. When a new record is created, Beacon SAP automatically applies the appropriate end date to the previous record.

When a position record is revised, the old record is not lost or overwritten (unless it is a correction entry), it just ceases to be the most current record. The old record remains in the system as part of the employee's history. Historical records will have actual start and end dates; the current record's end date is 12/31/9999. In case of a correction entry, the incorrect data is overwritten because you obviously don't need a historical record of the incorrect data.

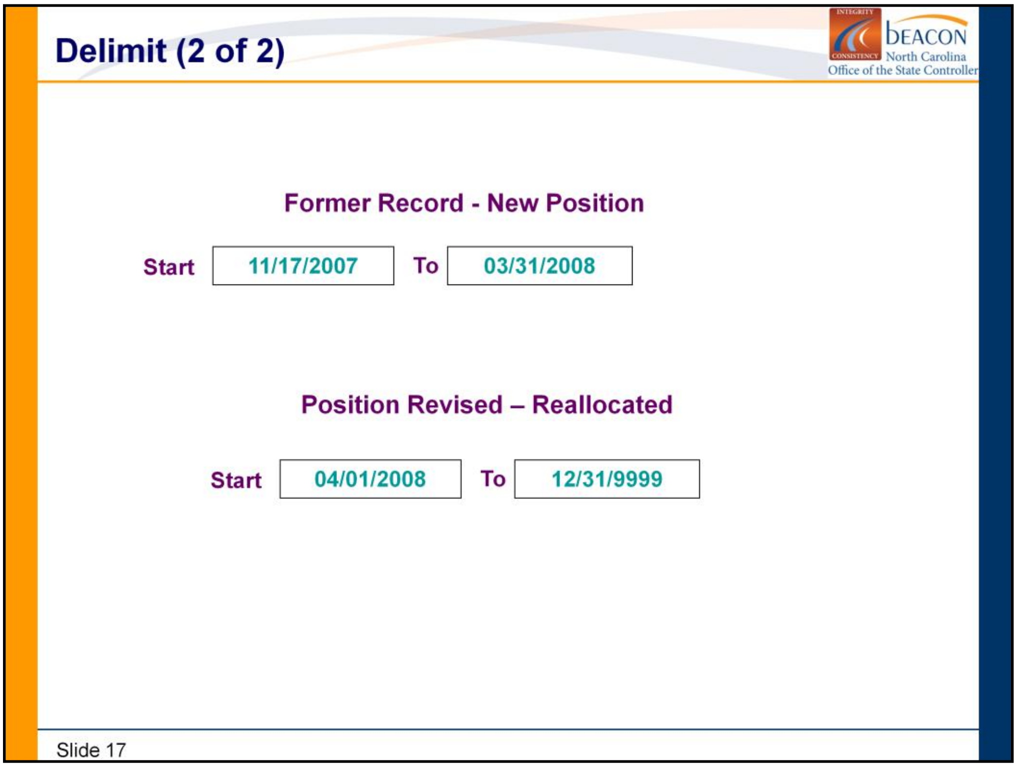
Notes:



Delimit means to put an end date on a previous record. When the new record for an infotype is created, BEACON SAP automatically delimits the previous record to one day prior to the new record's effective date, thereby preserving history. Any record with an end date other than 12/31/9999 has been delimited. The same concept about validity periods and delimiting records is applicable to employee records in Personnel Administration (PA).

In the example illustrated above, a new position record was created in Organizational Management (OM) when the position was created. At the time the position was created, BEACON SAP automatically assigned 12/31/9999 as the end date.

Notes:



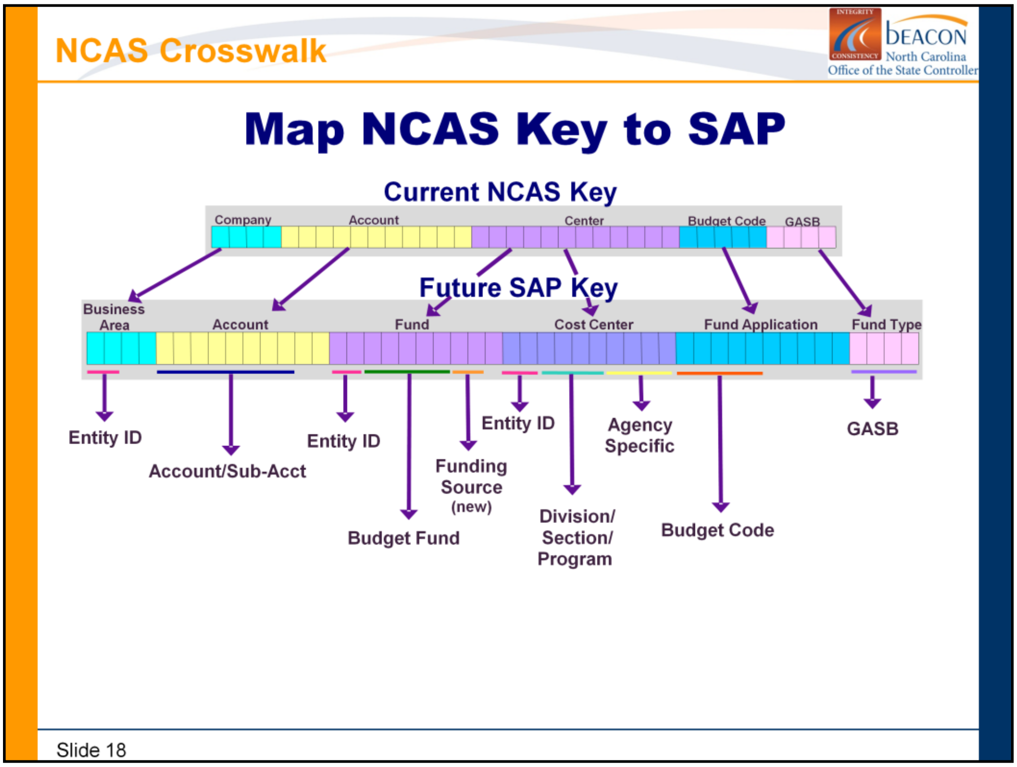
Notes:

When another position record is created or revised, BEACON SAP automatically delimits the former record *one day prior* to the new record, because records must not overlap. For example, a position cannot be active and abolished at the same time (or an employee cannot be single and married at the same time).

Continuing with our example, the position was reallocated 4/1/2008. The reallocation now becomes the current position record with an end date until the end of time. BEACON SAP automatically delimited the former record (Create Position) to 3/31/2008 when the effective date of the reallocation was entered.

Since BEACON SAP is date driven, it is important to understand the concept of records using validity periods, with beginning and ending dates. This allows many records to exist for positions in OM and employees in PA. You can retrace a position or an employee's records throughout the entire history with the organization.

As you are performing the exercises during this course, observe the previous data that is delimited.



Until all sub-modules of SAP have been implemented, there will be interfaces that crosswalk information from the new BEACON SAP HR system to the old Salary Control System (SCS) and NCAS.

Salary reserve information is currently interfaced from PMIS to SCS. Since BEACON SAP HR replaced PMIS, a new interface will send salary reserve information from BEACON SAP to the SCS. There will be a update that is run nightly.

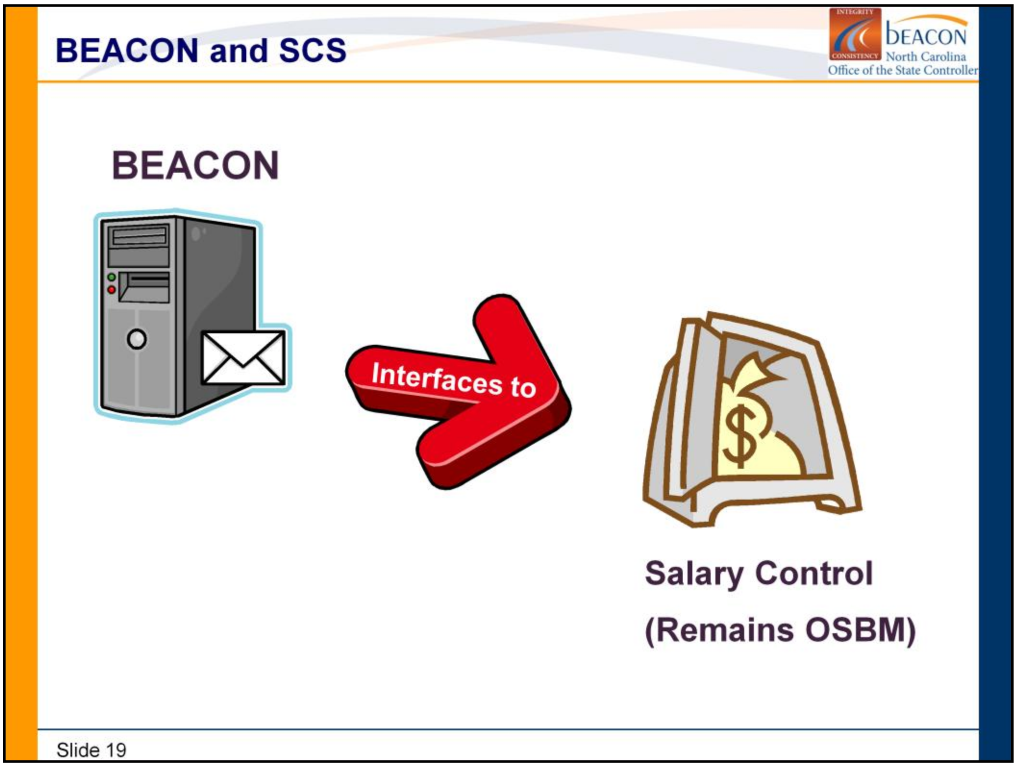
Until the SAP Financials have been implemented, the Order (Internal Order) field will hold the NCAS Company and cost center.

NOTE: Since DOT already has SAP Financials, their Internal Order numbers have meaning and are used to track specific costs.

Current Funding Sources:

01 Appropriated
04 Federal
05 Other Receipts
10 Highway (ONLY FOR DOC)

Notes:



The salary reserve information that is interfaced from BEACON SAP to the SCS sends relevant information and creates an output file. The file will be placed on a secure FTP (File Transfer Protocol) server.

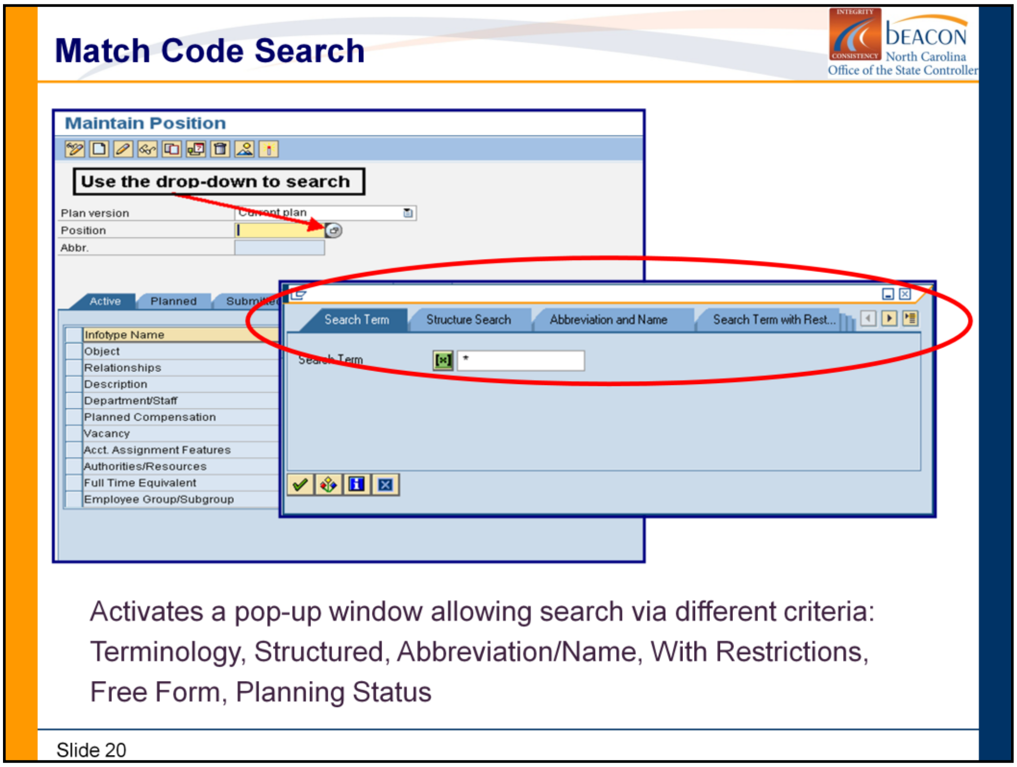
The Salary Control Interface Program is made up of two programs:

(a) The beginning balances at the beginning of the fiscal year
(b) The nightly run for daily changes

Over the course of the fiscal year, there are many changes that affect positions budgets and employees salaries and labor distributions. For example, new employees are hired, employees leave, promotions, demotions, and transfers occur. These changes have an impact on Agency budgets and salary reserves. As these changes occur, the interface program will flag the changes and record them in a text file. When the nightly batch job runs, the employees and positions that have been flagged are processed and the required fields are recorded in a text file.

Both interface programs will use the same output file. The interface program will generate a text file containing the SAP position number, new and previous personnel area, new and previous Organization Unit, new and previous hours, total position salary amount and individual position salary amounts (in the case of split funded positions), previous total position salary amount, previous individual position salary amounts, employee name, actual and previous annual salary amount, new and previous budget code in NCAS, old and previous fund code in NCAS, new and previous GL accounts in NCAS, new and previous center in NCAS, the reason code/action code (identifies type of change such as promotion, transfer, new hire, etc. when it applies).

Notes:



The **matchcode** button is available in many fields in BEACON. Depending upon the field that you are in, the matchcode option allows you to either select from a drop-down list or to enter search criteria. The graphic above illustrates the various types of search criteria that can be entered in PO13. As you can see there are 6 different tabs, with each tab allowing you a different search option. Each tab can be used with the wildcard * (asterisk). Using the * allows you to further narrow your selection criteria.

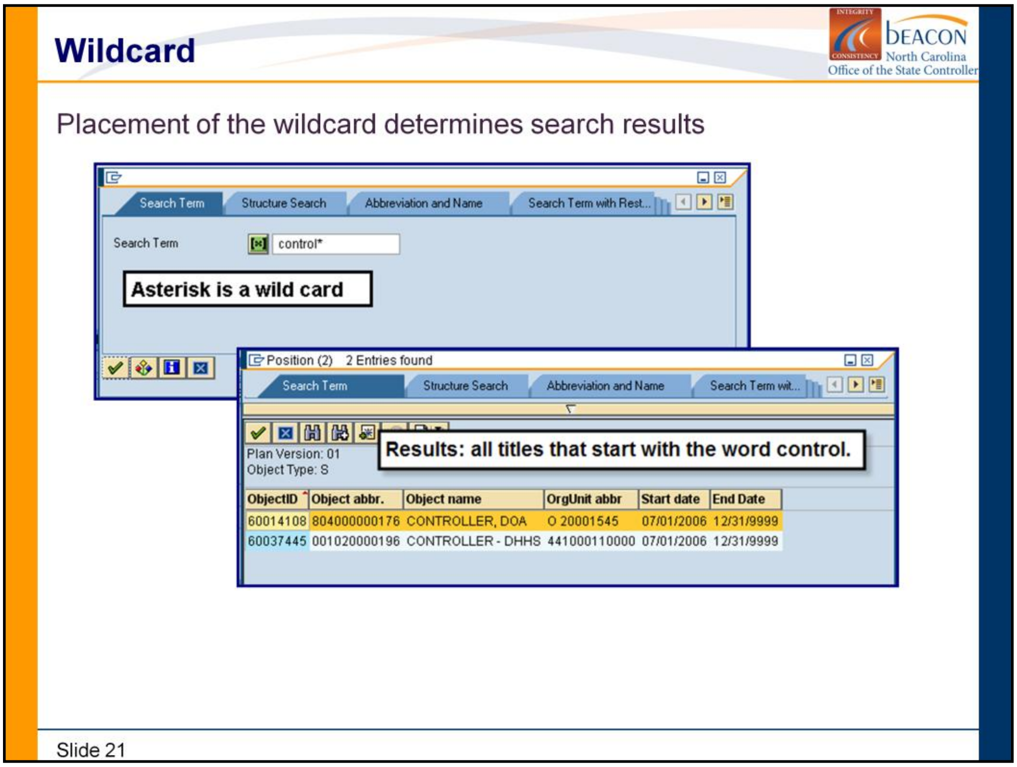
As a Funding Approver, you will most often use:

- **Search Term**: Enter the working title in the long description field.
- **Structured Search**: Displays the organizational structure so that you can search for a position in a specific Org Unit.
- **Abbreviation and Name**: Enter the Agency naming convention to display the short description which differs by Agency.
- **Free Search**: Use to specify detail search criteria that cannot be found in other search functions (such as cost center), similar to ad hoc reporting tool

Additional search options are:

- **Search Term with Restrictions**: Use to specify if specific information should or should not exist (for example, cost distribution)
- **Search Position with Planned Action**: A custom tool built for Workflow Initiators

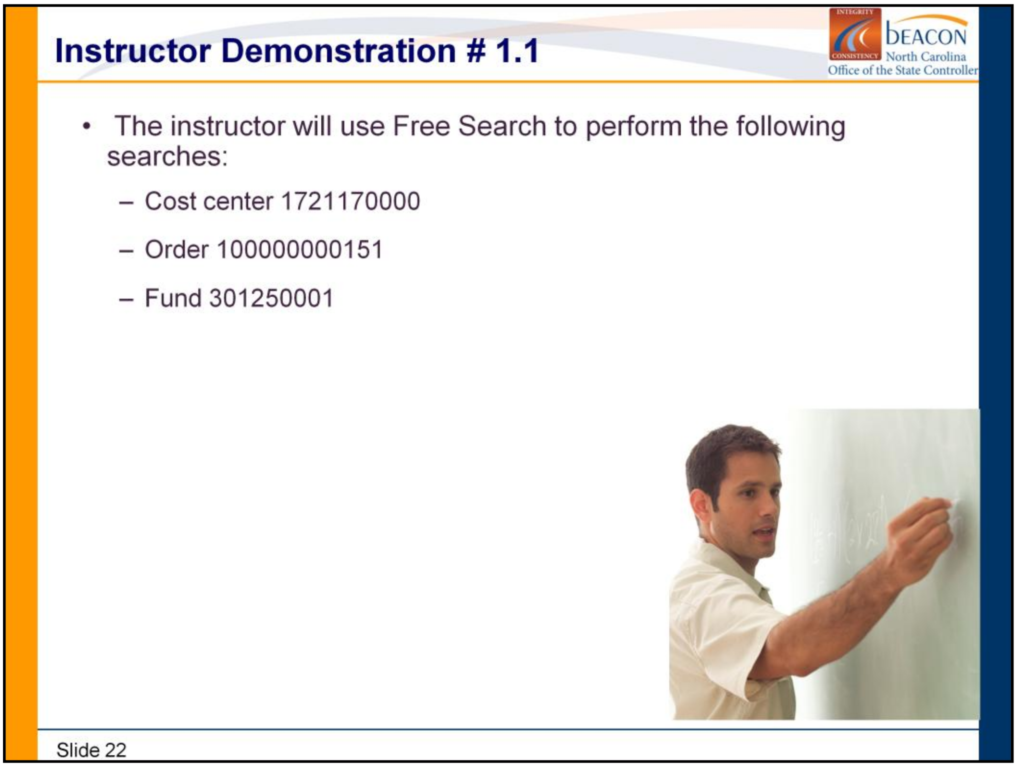
Notes:



Notes:

The placement of the wildcard (*) determines the type of results you receive as shown in the examples below. The wildcard can be used in any of the 6 search tabs.

- ***Control** results in a list of positions that <u>end</u> in the word *Control.*
- **Control*** results in a list of positions that <u>begin</u> with the word *Control*.
- ***Control*** results in a list of positions where the word *Control* may display anywhere in the position title.



The instructor will use data from the student’s exercise to demonstrate.

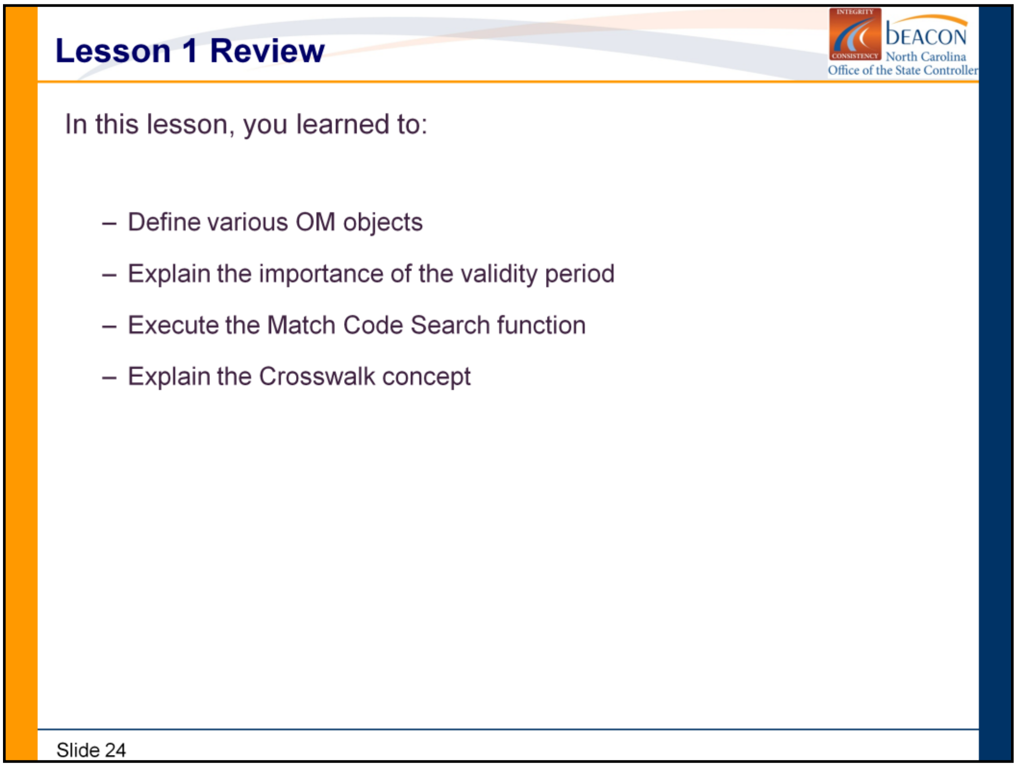
Notes:

Exercise # 1.1

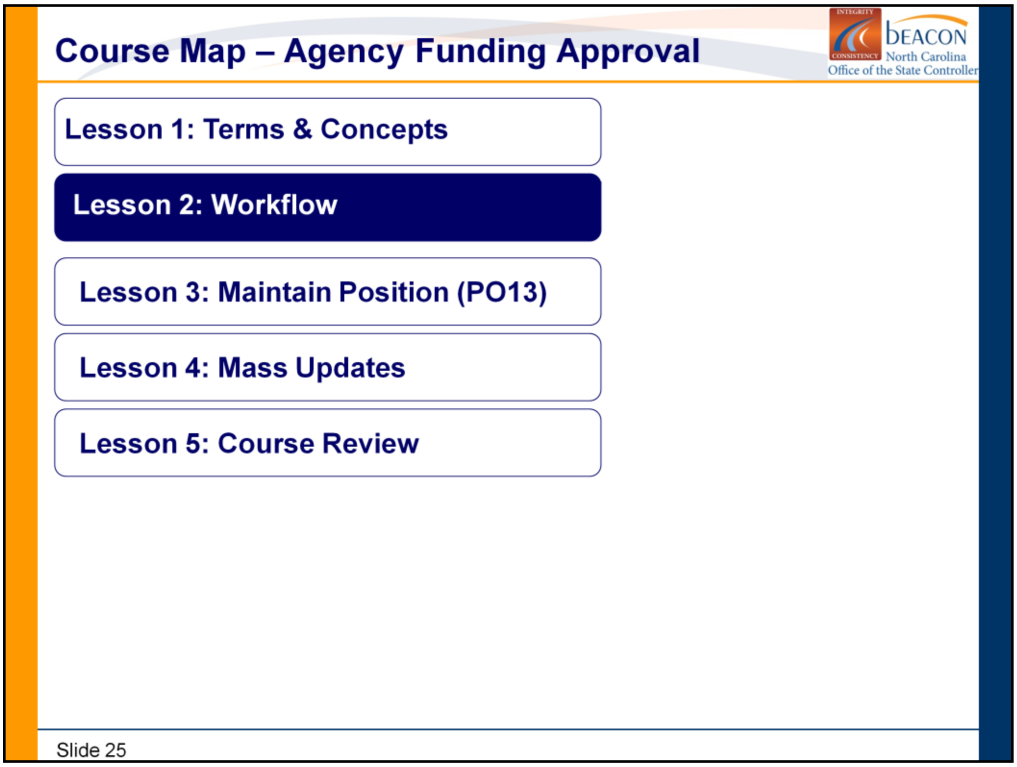
- Using Free Search perform the following searches and answer the questions in your Exercise Guide:
  - Cost center 1721170000
  - Order 100000000151
  - Fund 301250001

Slide 23

Notes:

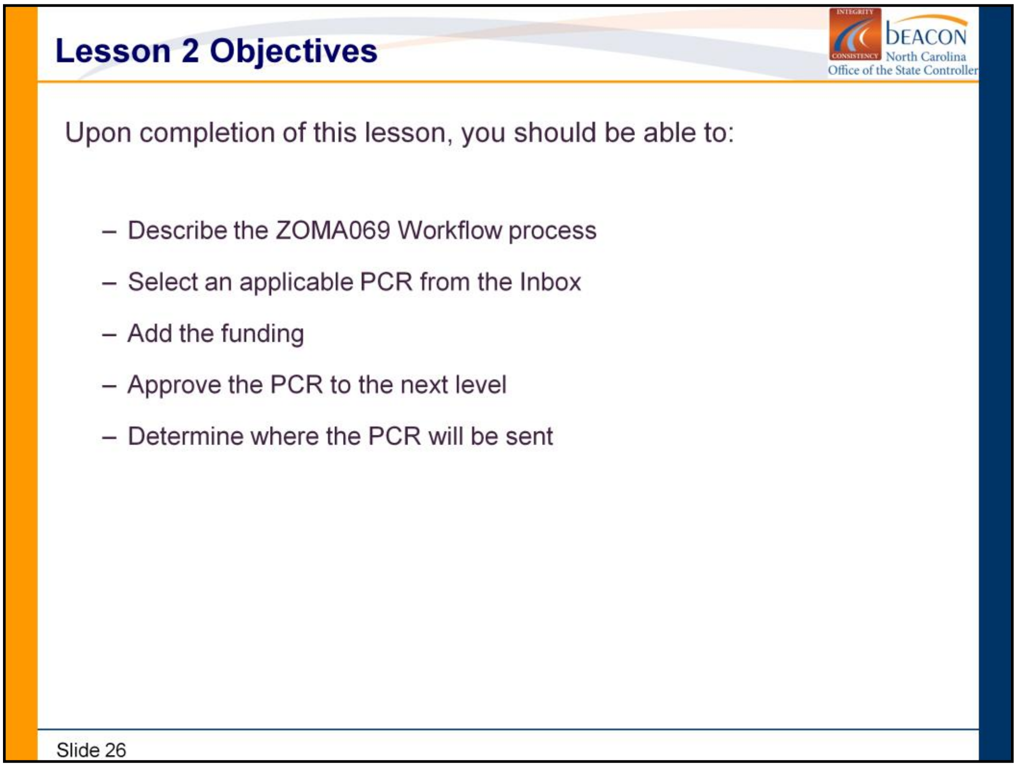

Lesson 1 Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
– Define various OM objects
– Explain the importance of the validity period
– Execute the Match Code Search function
– Explain the Crosswalk concept
Slide 24

Notes:



Course Map – Agency Funding Approval
BEACON North Carolina Office of the State Controller
Lesson 1: Terms & Concepts
Lesson 2: Workflow
Lesson 3: Maintain Position (PO13)
Lesson 4: Mass Updates
Lesson 5: Course Review
Slide 25

Notes:


Lesson 2 Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
– Describe the ZOMA069 Workflow process
– Select an applicable PCR from the Inbox
– Add the funding
– Approve the PCR to the next level
– Determine where the PCR will be sent
Slide 26

Notes:

Funding via Position Actions

BEACON North Carolina Office of the State Controller

- The majority of funding transactions are processed via Actions:
  - ZOMA069 for OM (positions)
  - ZPAA076 for PA (personnel)
- OM and PA Actions require Workflow
- OM and PA Actions are created by the Initiator
- Funding Approver accesses the Cost tab in the OM or PA Action

Slide 27

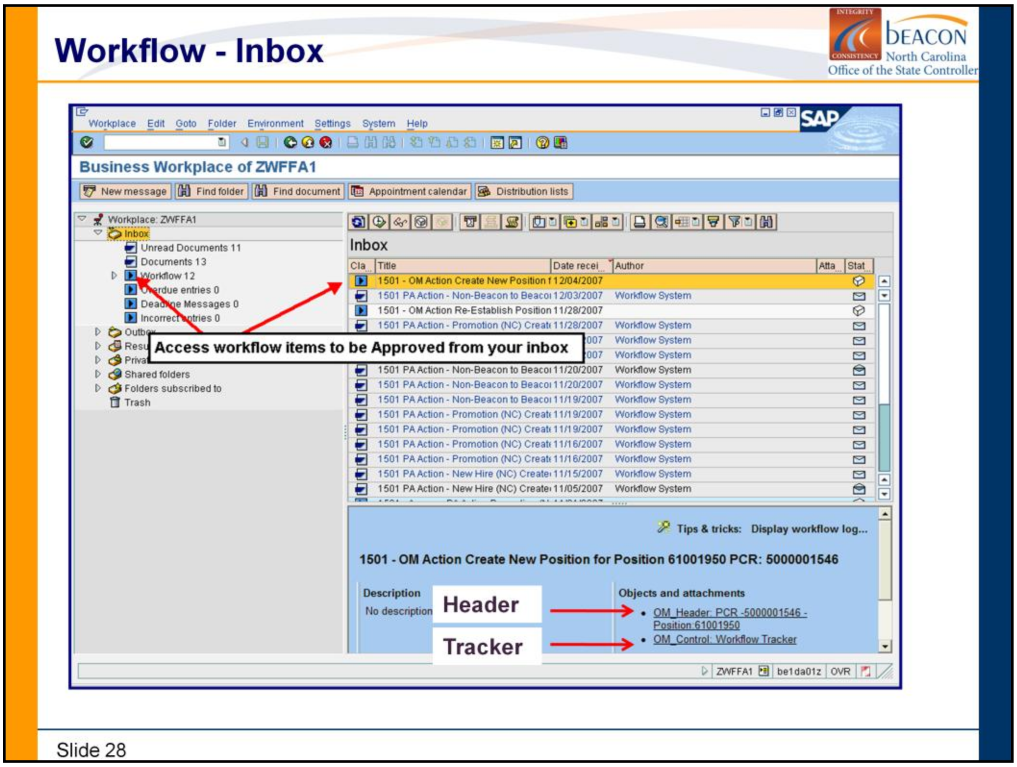
OM Actions

- Create New Position
- Re-establish Position
- Reallocate Position Up
- Reallocation Position Dow
- Reallocation Position Horizontal
- Position Adjustment from Auth
- Reallocate Position Differential
- Remove Position Differential
- Abolish Position
- Position Transfer
- Position Hours Change
- Position Employee Group/Subgroup Change
- Position County Change
- Change Supervisor of Position

PA Actions

- New Hire
- Promotion
- Non-Beacon to Beacon
- Separation Pay Continuation
- Separation
- Transfer
- Reinstatement
- Reallocation
- Appointment Change
- Quick Entry
- Investigatory with Pay
- Suspension
- Salary Adjustment
- Cancel Salary Adjustment
- Range Revision
- Career Progression
- Demotion

Notes:



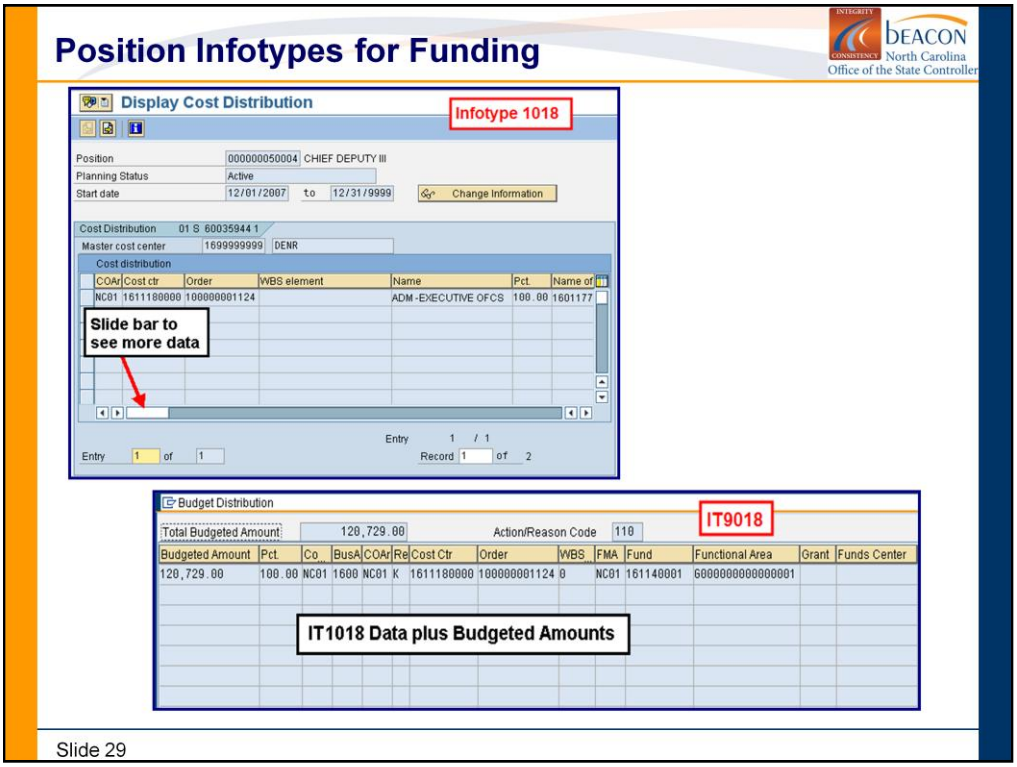
A separate course, WF220 BEACON SAP Workflow describes the workflow process in detail. A brief summary is included here.

Notes:

As previously mentioned, one of the ways you may access funding infotypes is via Workflow because the Initiator created the Action, such as those listed on the previous page. In those cases, the Funding Approver is the first approval level in the process (in Personnel Administration, funding is the last level in the approval process). When the Initiator creates the Action, a Personnel or Position Change Request (PCR) number is generated. In order to approve the PCR, you must access your Inbox.

After selecting the applicable PCR, you should first access the Position Header link in order to review the accuracy of data associated with the PCR. In OM you will see the General, Addresses, and Time tabs. In PA you will only see the General tab. Although you can view the tabs, you cannot make changes. If an error has been entered, you must return the PCR to the Initiator with a note indicating the correction that needs to be made.

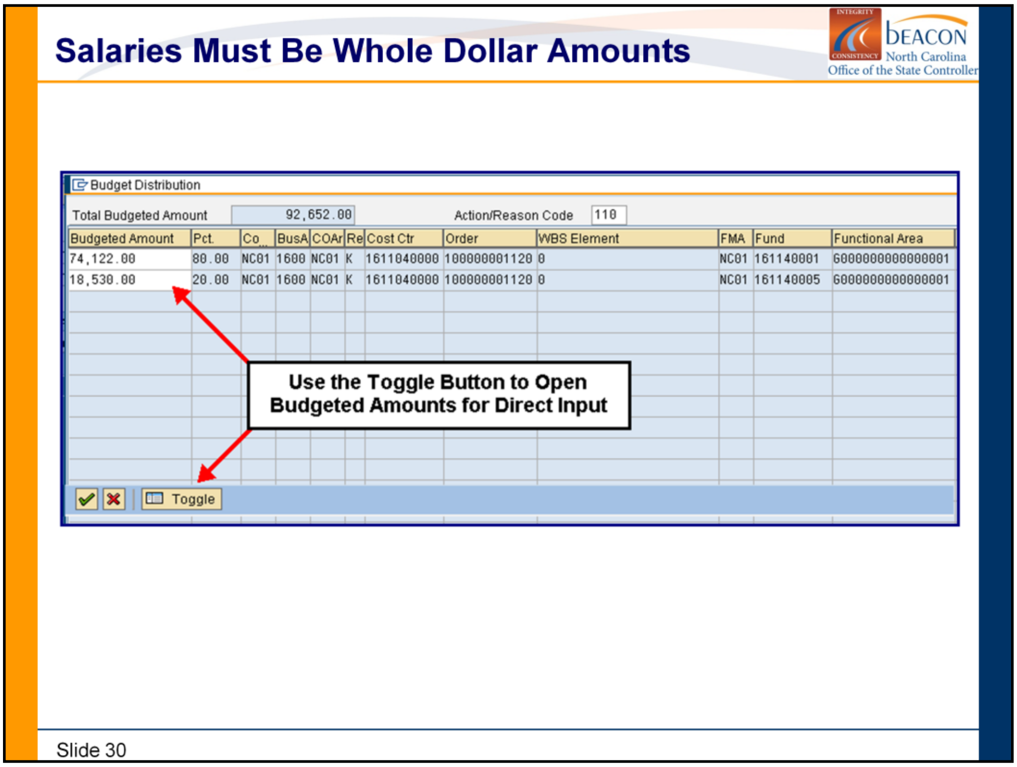
After viewing the pertinent information, you will enter funding data on the Cost tab.



On the Cost Tab, enter the data as applicable in the funding fields. After you save and press Enter, the Budget Distribution screen is displayed. You will, at a minimum, enter the reason for the funding update. The reason code displays on BI Position Reports and is sent to the Salary Control System.

You can view IT9018 separately from IT1018, by scrolling down on the Maintain Position screen and selecting the *Display Budget* infotype. You can only view budget information here however, you must make changes via IT1018.

Notes:

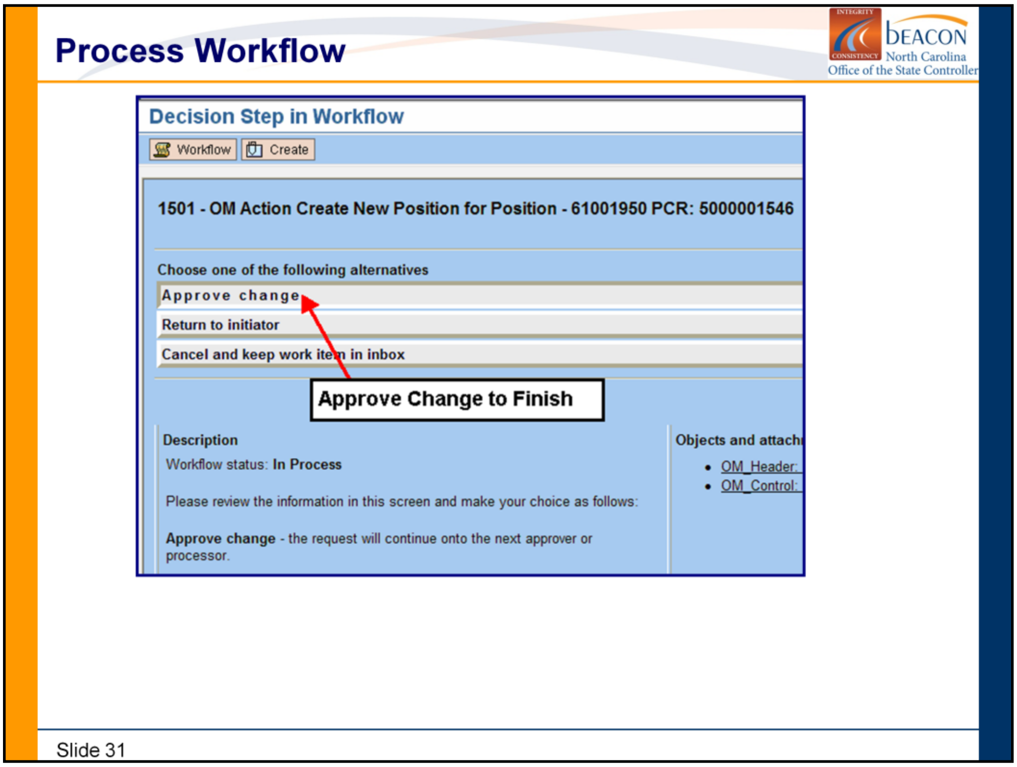


The salary amounts in the Budgeted Amount column must be in whole dollar amounts. Therefore, if you enter the percentages in split funding and the dollar amounts display as other than whole dollars, you will use the ‘Toggle’ button to open the ‘Budgeted Amount’ fields. Use this feature to change amounts to whole dollars. After you change the amounts to whole dollars, BEACON SAP will automatically re-adjust the percentages as applicable (although the change is slight and will probably not be reflected on the screen).

Use the ‘Toggle’ button again to close the ‘Budgeted Amount’ fields and open the ‘Total Budgeted Amount’ field.

The ‘Toggle’ button allows you to jump back and forth between ‘Total Budgeted Amount’ and the ‘Budgeted Amount’ detail lines.

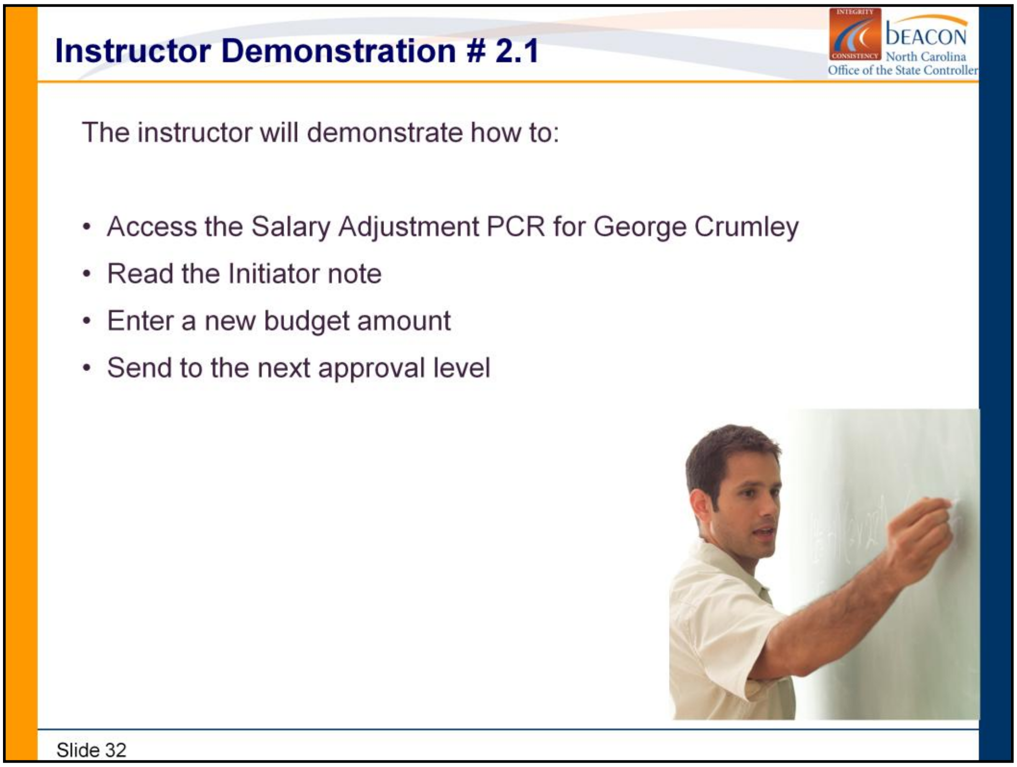
Notes:



After you review the PCR, enter the funding information and save it, the *Decision Step in Workflow* is displayed and you can chose to:

- Approve the PCR and send it to the next level. It is important to note that you should never simply approve the PCR without first opening it and entering the funding data on infotypes 1018 and 9018.
- Return the PCR to the Initiator. If you select this option, you will be required to write a note to the Initiator indicating the reason you are rejecting it.
- Cancel the PCR and keep it in your Inbox so that it is not available for other Approvers at your level. You can use this option when you need to research information before applying the funding and sending the PCR to the next level.

Notes:



Notes:

The instructor will use data from the student's exercise to demonstrate.

Exercise # 2.1

- Access your Inbox and find the Salary Adjustment PCR for George Crumley
- Access the PCR and read the Initiator note
- Enter the a new budget amount
- Send to the next approval level

Slide 33

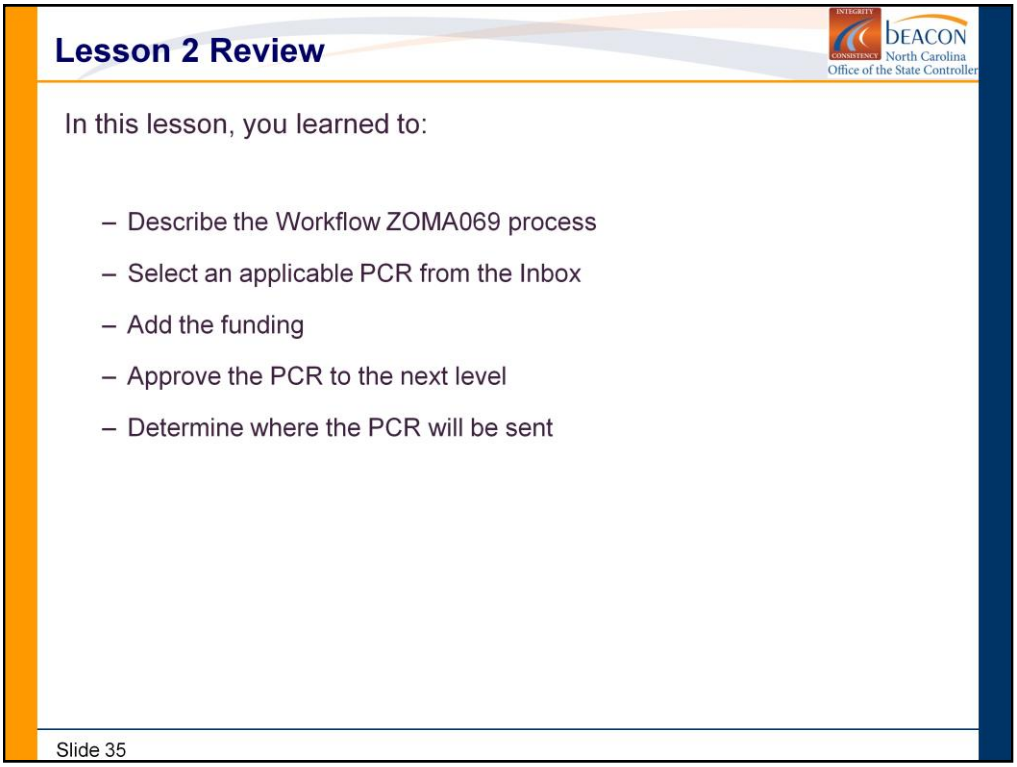
Notes:

Exercise # 2.2

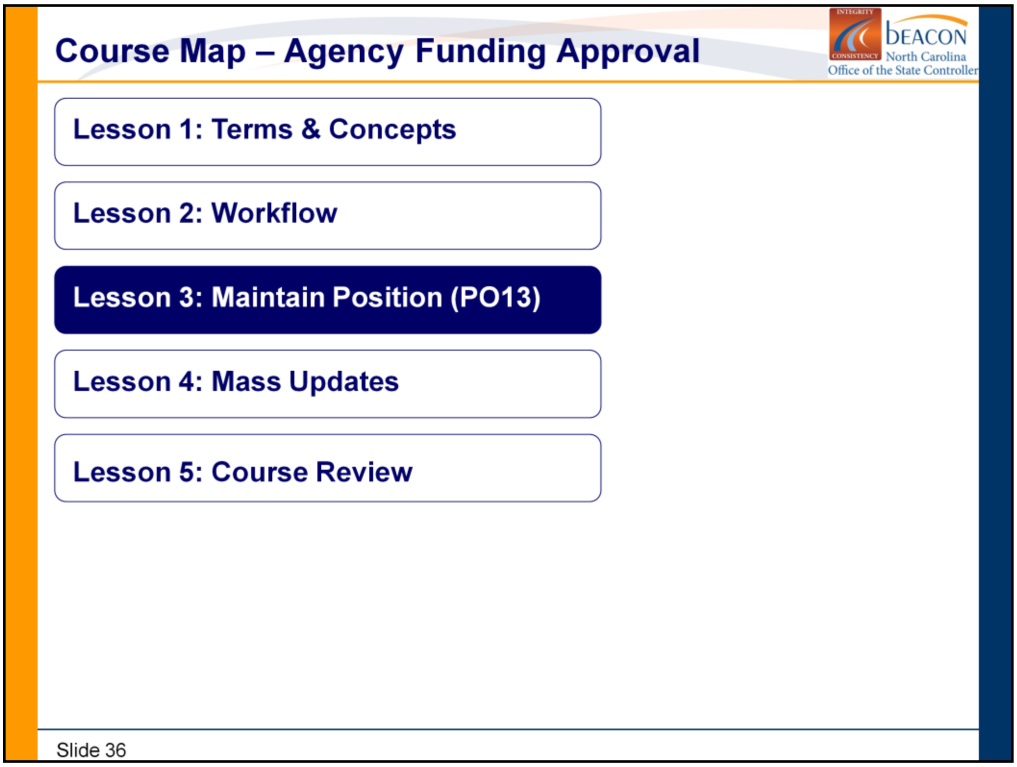
- Access your Inbox and find the Reallocation PCR for Eunice Rivera
- Access the PCR and read the Initiator note
- Enter the budget data
- Send to the next approval level

Slide 34

Notes:


Lesson 2 Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
– Describe the Workflow ZOMA069 process
– Select an applicable PCR from the Inbox
– Add the funding
– Approve the PCR to the next level
– Determine where the PCR will be sent
Slide 35

Notes:


Course Map – Agency Funding Approval
BEACON
North Carolina
Office of the State Controller
Lesson 1: Terms & Concepts
Lesson 2: Workflow
Lesson 3: Maintain Position (PO13)
Lesson 4: Mass Updates
Lesson 5: Course Review
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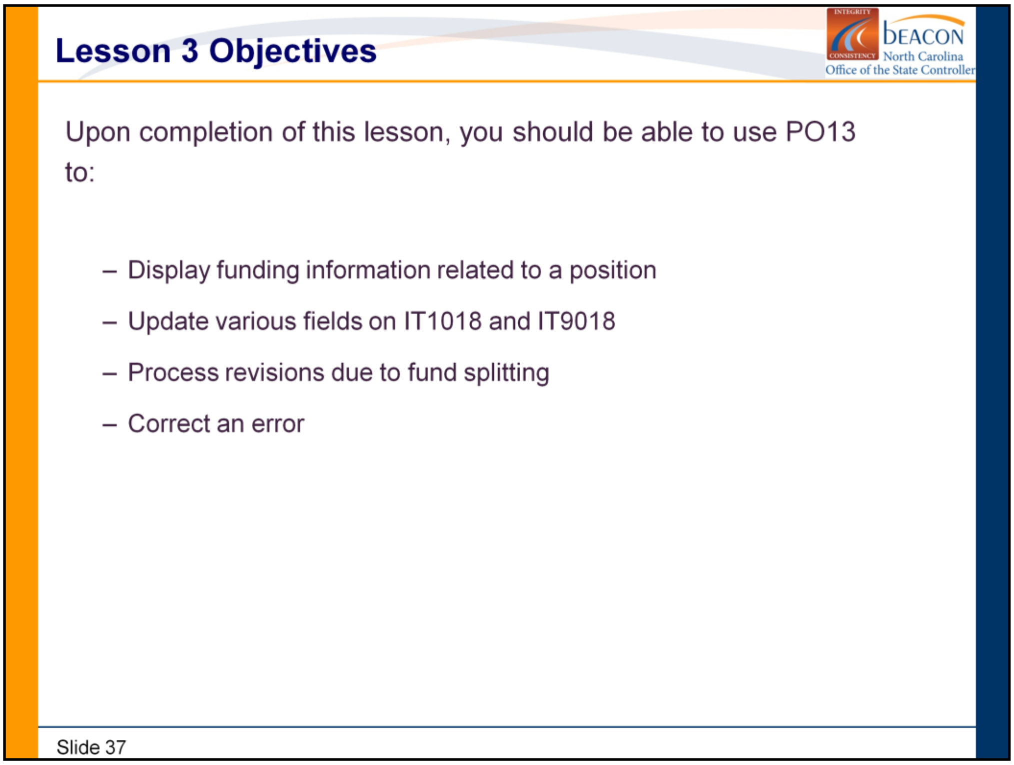
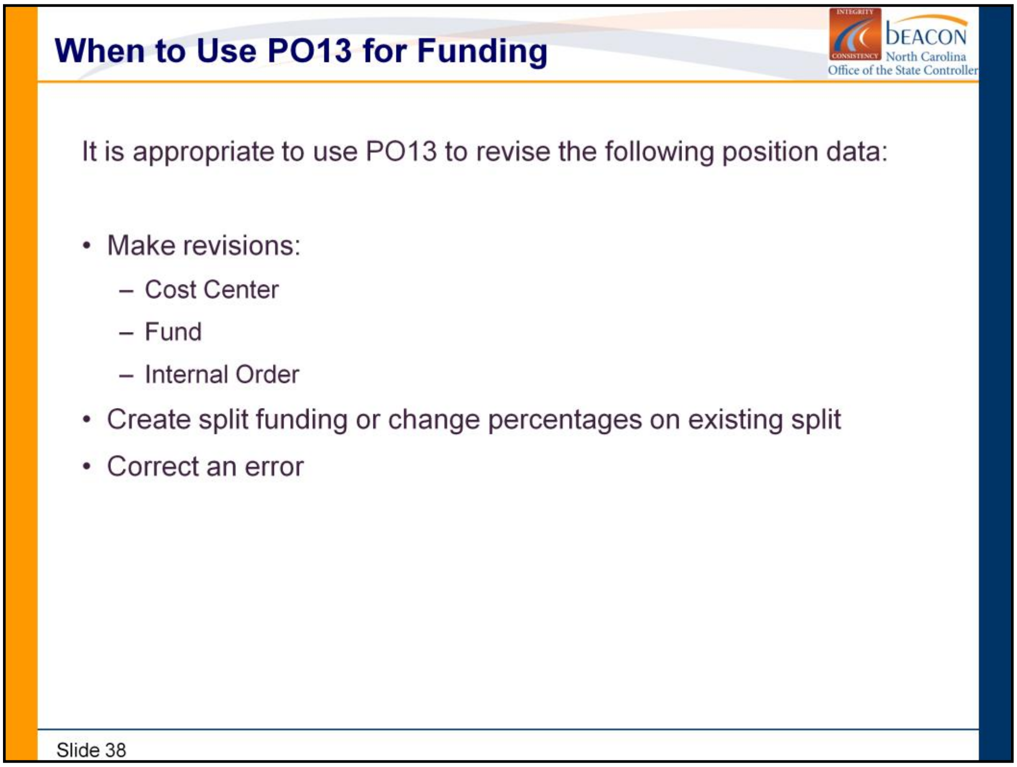
Notes:


Lesson 3 Objectives
Upon completion of this lesson, you should be able to use PO13 to:
– Display funding information related to a position
– Update various fields on IT1018 and IT9018
– Process revisions due to fund splitting
– Correct an error
Slide 37

Notes:



Notes:

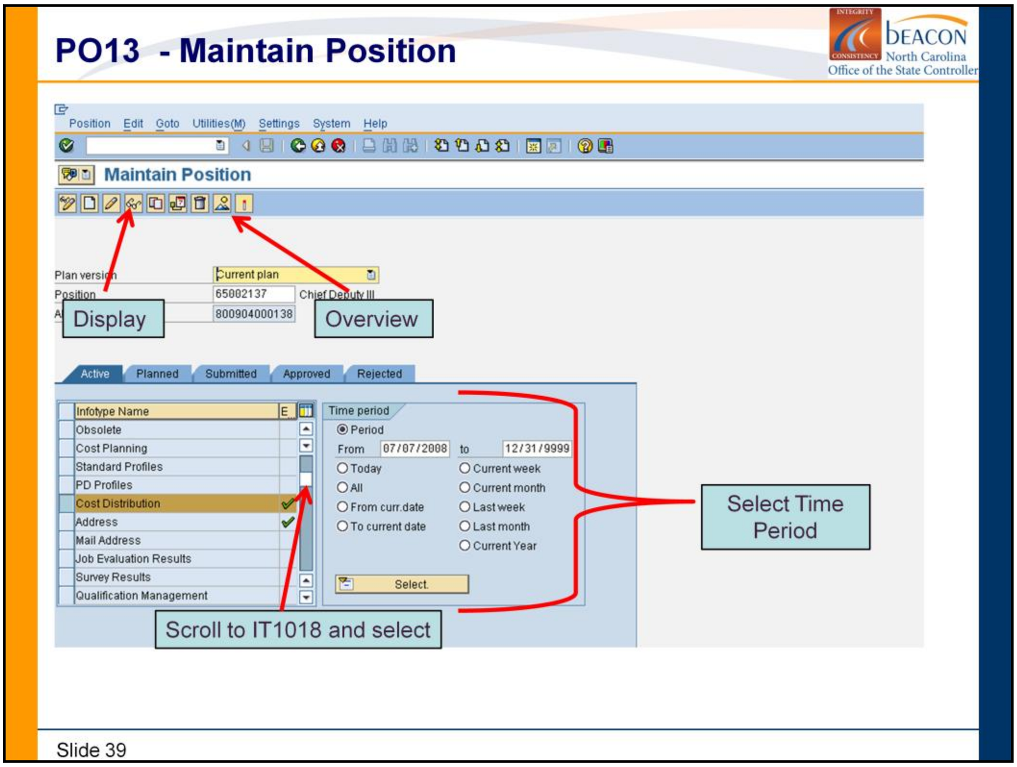
As indicated in a previous lesson, most funding is processed via your Inbox. However, there are a few instances when it is applicable to use PO13 (Maintain Position).

You may use PO13 to revise the Cost Center, Fund, or Internal Order data and to add or revise split funding. In addition, you can correct errors using PO13. And finally, if the funding information was inadvertently omitted during an Action (ZOMA069 or ZPAA076), you can use PO13 to add the missing data. However, the latter case should be a rare occurrence, since Funding Approvers should always click the Cost tab in an Action to enter funding data before approving the PCR.

The reasons in the PO13 drop-down list that you will use are:

- 110 Source of Position's Fund Change
- 111 Position budgeted Salary Change
- 112 Legislative Increase for Position

You will see several other reasons in the drop-down list, but they are not appropriate for you to use (although BEACON will not stop you from doing so).



Notes:

To access the Maintain Position screen, enter PO13 in the Command Field on the Easy Access screen. On the Maintain Position screen, you will enter the position number, time period, and select the infotypes you are going to update: IT1018 or IT9018. You should be aware that the number of the last object you recently accessed will automatically display in the Position field, even if that object was an Org unit or a Job; therefore, ensure that the field contains the position number.

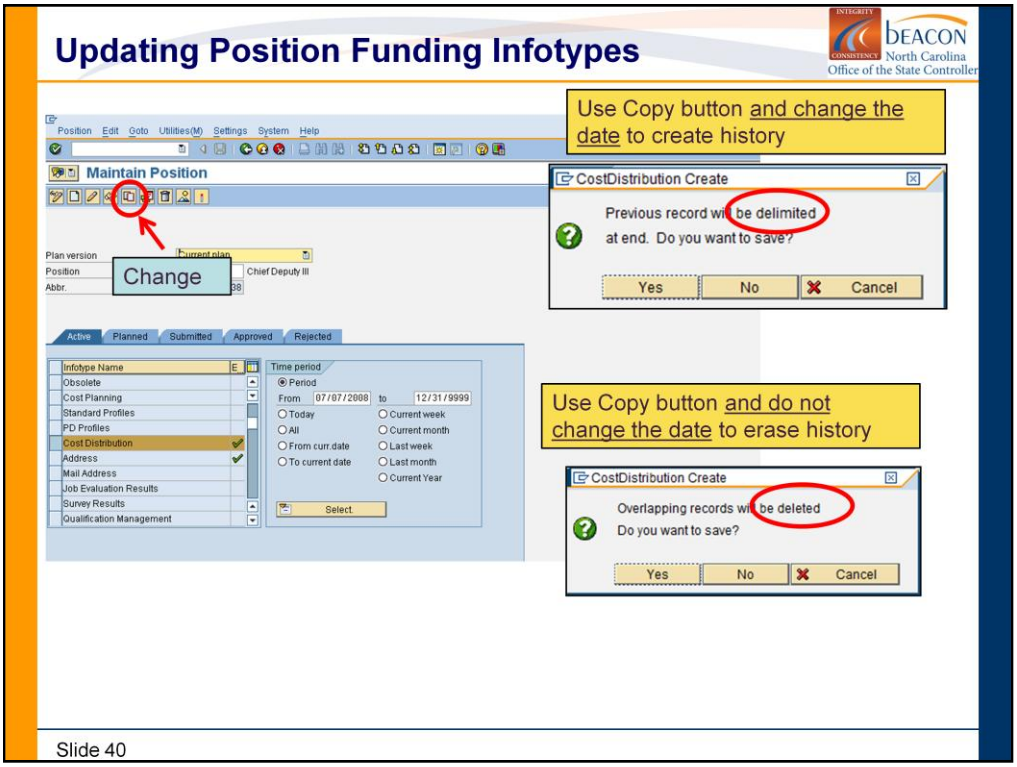
From the Maintain Position screen you can:

- View position funding infotypes
- Update position funding infotypes

View Position Funding Infotypes

To view the funding infotypes (IT1018 and IT9018), select the Cost Distribution infotype and click either the Display (glasses) icon or the Overview (mountains). The Display icon allows you to see the full infotype screen while the Overview shows you a list or summary of the entries made for the Infotype.

The Budget infotype can be seen by pressing Enter when you are on the Cost Distribution screen. As mentioned previously, you can also select Display Budget to see IT9018 instead of going through IT1018.



Update Position Funding Infotypes

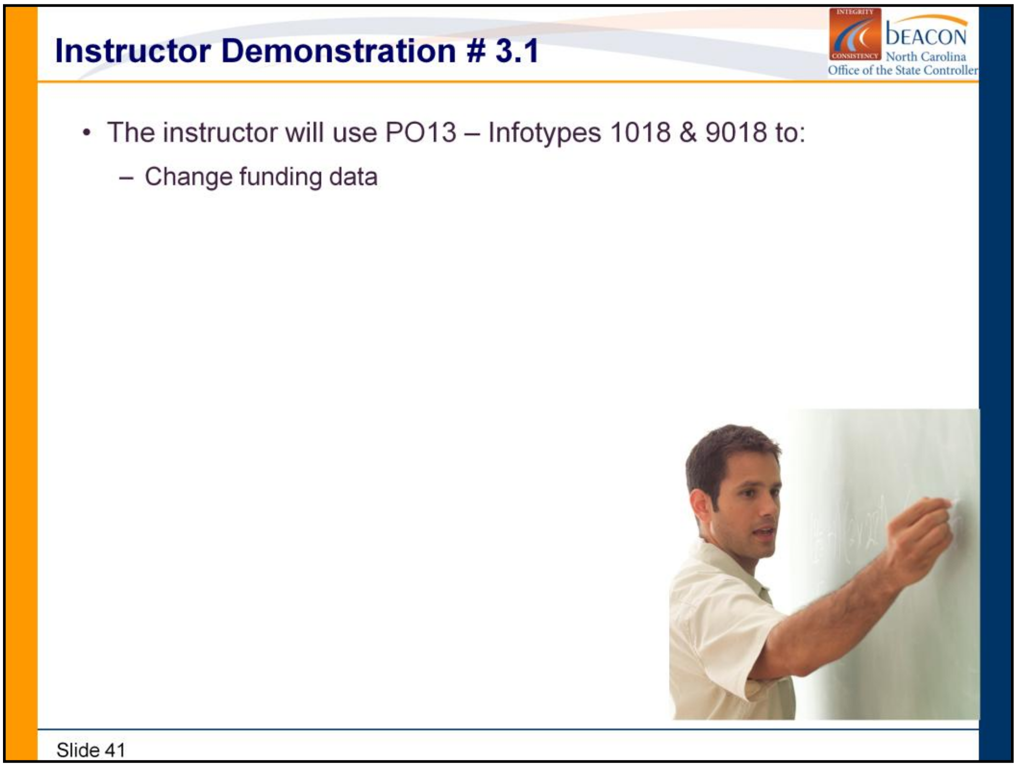
To update or revise position funding data, use the Copy icon and **be sure to enter the new date** as applicable. Failure to use a new date will overwrite existing history. You should be aware that the date of the last entry on the infotype will default, so it is critical that you change the date to the new effective date. When you have correctly updated position funding infotypes, you should receive a pop-up that indicates previous data will be delimited as illustrated above.

Correct Position Funding Infotypes

A decision was made that State HR personnel **will not use** the Pencil (Change) icon in order to correct errors. Instead, use the Copy function, but **be sure to leave the date as the original date** in order to overwrite the existing data. You will note that this is very different than the instructions in the *Update Position Funding Infotypes* section (above). When you are over-writing history, you should receive a message (shown above) that indicates the previous record will be deleted.

It is critical to understand that the entry of the date impacts whether history is maintained or erased.

Notes:



Notes:

The instructor will use data from the student's exercise to demonstrate.

Exercise # 3.1

Effective today the Deputy Chief III position has a different cost center. Make the appropriate update to the position to indicate that 1611300000 is the new Cost Center. The budget amount did not change.

Before you make the revision, view the infotype first using the Display function.

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Notes:

Exercise # 3.2

BEACON North Carolina Office of the State Controller

Effective today the Assistant Secretary for EHNR position will be split 70% appropriated fund 161140001 and 30% receipt supported 161140005. Make the appropriate revisions to the position.

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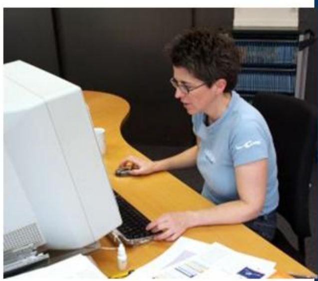
Notes:

Exercise # 3.3

Effective today the budget for the Office Assistant V will be $35k instead of the previous amount. Make the appropriate revision to the position using the applicable reason code.



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Notes:

Exercise # 3.4

BEACON North Carolina Office of the State Controller

The percentages for the split funding on the Assistant Secretary for EHNR was entered incorrectly. Make the correction on the position funding.

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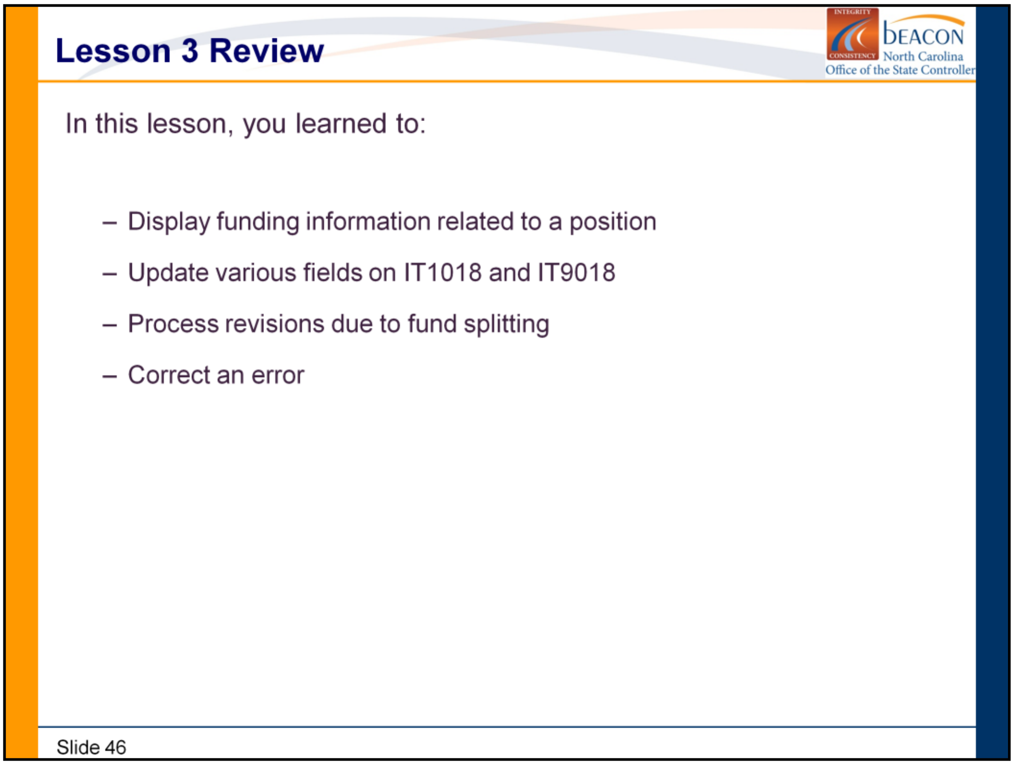
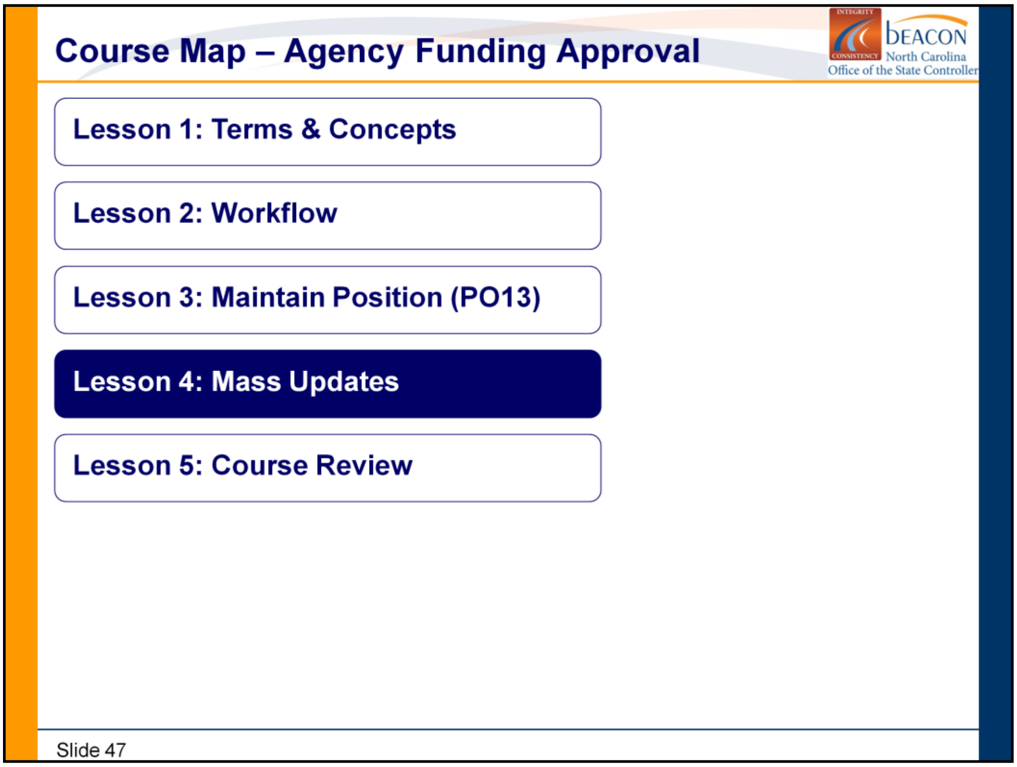
Notes:


Lesson 3 Review
bEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
– Display funding information related to a position
– Update various fields on IT1018 and IT9018
– Process revisions due to fund splitting
– Correct an error
Slide 46

Notes:


Course Map – Agency Funding Approval
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Notes:

Lesson 4 Objectives

Upon completion of this lesson, you should be able to:

- Describe the Mass Update process
- Identify the factors that determine when Mass Update can or cannot be used
- List the Agency responsibilities
- Describe BEST responsibilities

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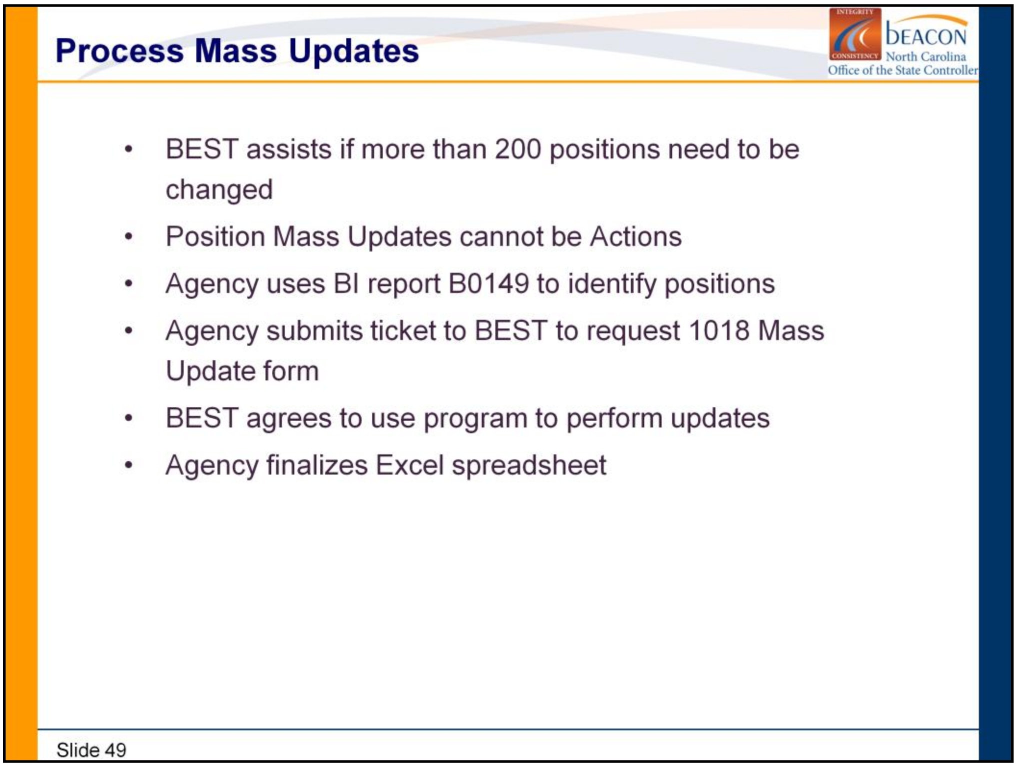
Notes:



<u>Notes:</u>

If an Agency is faced with changing hundreds of funds, funds sources, percentages, or Cost Centers on positions, BEST Shared Services can run a program to do a mass update from an Agency spreadsheet. It is important to note that the types of changes that can be done via the mass update **does <u>not</u> include Actions**, such as create, transfer, reallocate, change county, etc.

To qualify for the use of the BEST mass update option, the Agency must have 200 or more positions that need to be updated. The Agency can use BI report B0149 to identify and analyze position data. The Agency creates a ticket with BEST to request the *1018 Mass Update* form. When BEST receives the form, the request is evaluated and either the mass update is scheduled or rejected.

BI Report B0149

Org Unit		Position		Fund Applctn	Fund	Funding Source	Cost Center	NCAS Financial Key	Fund Percent
20000050	Information Technology	60087575	NETWORKING ANALYST	24667	412700001	Appropriated	4110006000	410227204960	10.00
20000050	Information Technology	60087575	NETWORKING ANALYST	24667	412750005	Receipts	4110250000	410227307012	50.00
20000050	Information Technology	60087575	NETWORKING ANALYST	74660	417110004	Federal	4110260000	410227204901	20.00
20000050	Information Technology	60087575	NETWORKING ANALYST	74660	417200004	Federal	4120001100	410227207011	20.00
20001612	ADMIN DSLEG STATE CAP POL DP CHF Ex Pr 1	60014429	PUBLIC SAFETY OFFICER	14100	131623001	Appropriated	1316230000	13011623	100.00
20001612	ADMIN DSLEG STATE CAP POL DP CHF Ex Pr 1	60014438	PUBLIC SAFETY SUPERVISOR	14100	131623001	Appropriated	1316230000	13011623	100.00
20001612	ADMIN DSLEG STATE CAP POL DP CHF Ex Pr 1	60014445	PUBLIC SAFETY OFFICER	14100	131623001	Appropriated	1316230000	13011623	100.00
20001683	DOT Counsel For Envir & Trans Issues	60014910	AGENCY GENERAL COUNSEL II	80000	151500010	Highway Funds	0000150007	#	100.00
20001683	DOT Counsel For Envir & Trans Issues	60014920	EXECUTIVE ASSISTANT I	80000	151500010	Highway Funds	0000150007	#	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60081983	REVENUE ADMIN OFF I	14700	451660005	Receipts	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60081984	REVENUE OFFICER I	14700	451660005	Receipts	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60081985	REVENUE OFFICER I	14700	451660005	Receipts	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60082005	REVENUE OFFICER I	14700	451660005	Receipts	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60082076	REVENUE ADMIN OFF II	14700	451660001	Appropriated	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60082084	INFORM PROCESSING TECH	14700	451660001	Appropriated	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60082089	REVENUE ADMIN OFF I	14700	451660001	Appropriated	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60082157	REVENUE ADMIN OFF I	14700	451660001	Appropriated	4516600000	45011660	100.00
20010054	REV ADM TC COLLECT Oic Unit Guilford	60082463	PROCESSING ASSISTANT V	14700	451660001	Appropriated	4516600000	45011660	100.00
Result									

Used to Analyze Data Before Creating Spreadsheet

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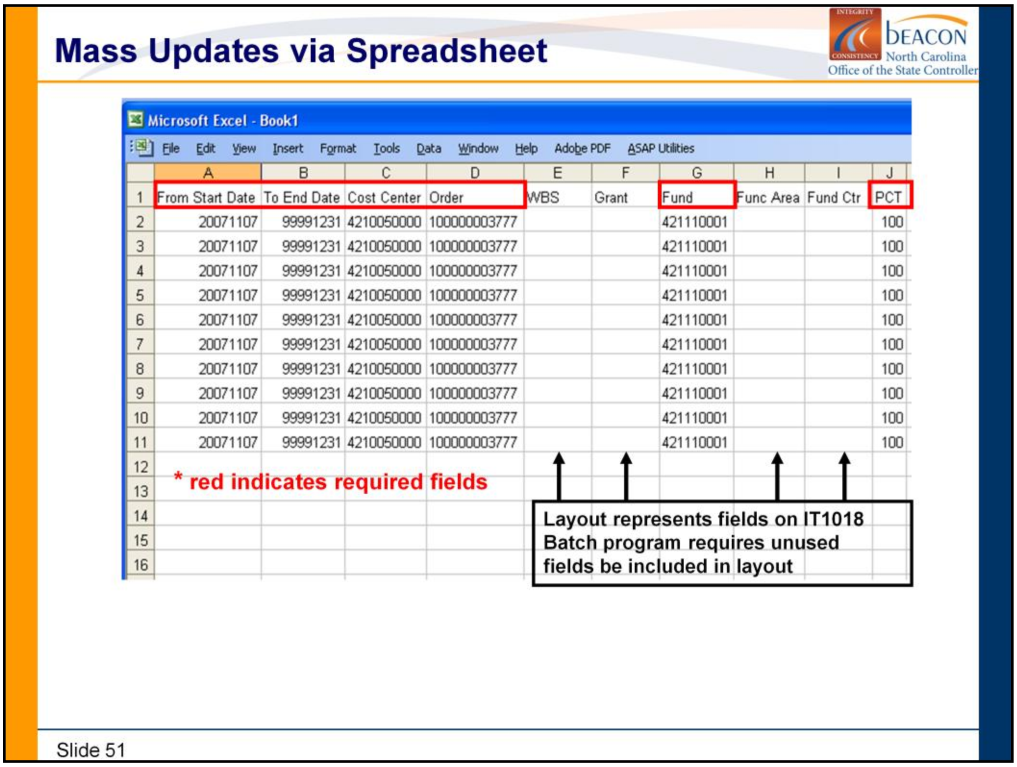
Fields that can display on the report:

- Position
- Cost Center
- Position City
- Position Address Street
- Position Pay Area
- Position Pay Group
- Position Pay Level
- Position Vacancy
- Position End Date
- Position Start Date
- Position # (PMIS)
- Employee Group
- Employee's Name
- Employee
- Employee Subgroup
- Supervisor Position
- ES Grouping for CAP
- Organizational Unit
- Job
- Job Family
- Job Pay Group
- Job Pay Type
- Job Branch
- Job Pay Area
- Job Pay Level
- Job Branch
- Fund
- Fund Application
- Funding Source
- Fund Type
- NCAS Financial Key
- Valid From
- Valid To
- Reference SAP Position

Notes:



	A	B	C	D	E	F	G	H	I	J
1	From Start Date	To End Date	Cost Center	Order	WBS	Grant	Fund	Func Area	Fund Ctr	PCT
2	20071107	99991231	4210050000	100000003777			421110001			100
3	20071107	99991231	4210050000	100000003777			421110001			100
4	20071107	99991231	4210050000	100000003777			421110001			100
5	20071107	99991231	4210050000	100000003777			421110001			100
6	20071107	99991231	4210050000	100000003777			421110001			100
7	20071107	99991231	4210050000	100000003777			421110001			100
8	20071107	99991231	4210050000	100000003777			421110001			100
9	20071107	99991231	4210050000	100000003777			421110001			100
10	20071107	99991231	4210050000	100000003777			421110001			100
11	20071107	99991231	4210050000	100000003777			421110001			100

Notes:

Shown above is a sample of the '1018 Mass Update Layout.xls' file which will be used to make mass update changes to BEACON.

Currently the following fields are not being used: WBS, GRANT, FUND CTR and should not be populated however they still need to be represented on the spreadsheet. All fields (except the unused WBS, GRANT, FUND CTR) are required fields and must be completed even if there is no change to the field.

- Position – number of the position to be updated
- From Start Date – start date of the validity period (YYYYMMDD)
- To End Date – end date of the validity period (YYYYMMDD) usually 99991231
- Cost Center – cost center number
- Order – internal order number
- WBS – leave blank
- Grant – leave blank
- Fund – Funding number
- Functional Area – leave blank
- Fund Center – leave blank
- Percentage – percentage associated with the cost distribution

Multiple lines should be entered for funding splits and the appropriate percentage listed on each line.

Verify that the cost center, internal order and fund numbers are correct as there is no validation on a spreadsheet.

Lesson 4 Review

BEACON North Carolina Office of the State Controller

In this lesson, you learned how to:

- Describe the Mass Update process
- Identify the factors that determine when Mass Update can or cannot be used
- List the Agency responsibilities
- Describe BEST responsibilities

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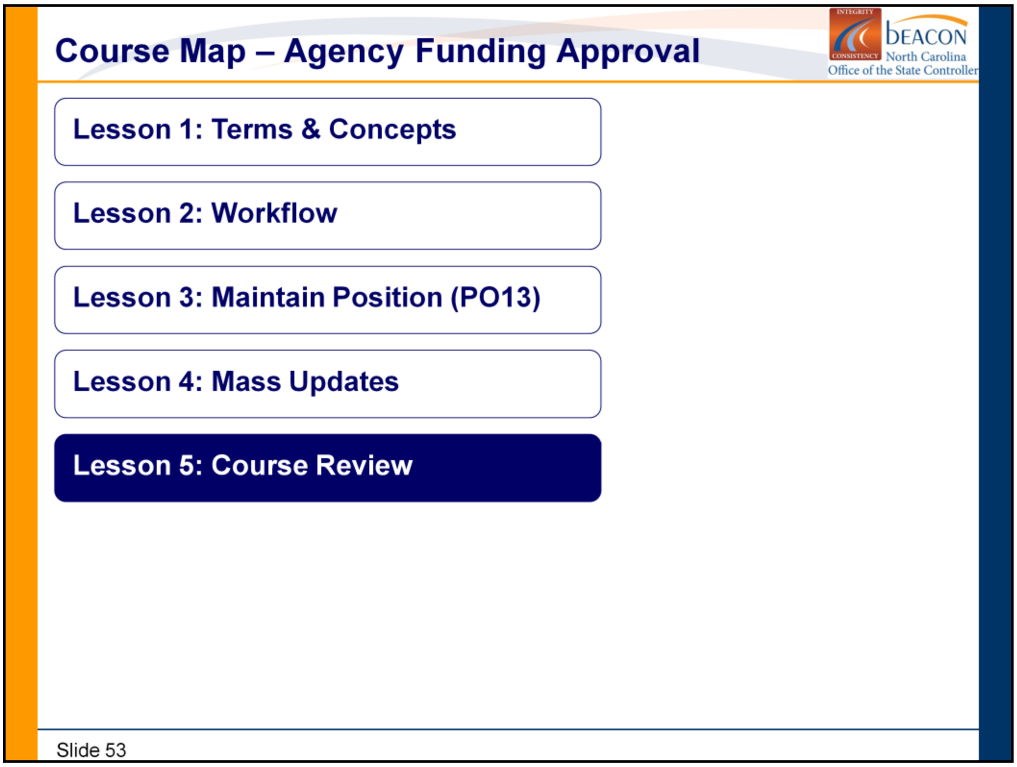
Notes: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Notes:

Course Review

BEACON North Carolina Office of the State Controller

In this course, you learned to:

- Define key terms and concepts
- Describe the Crosswalk between NCAS and SAP
- Identify the relationship between BEACON and Salary Control
- Execute the Match Code search function
- Process Workflows
- Display or update funding infotypes
- Describe the process for Batch Updates

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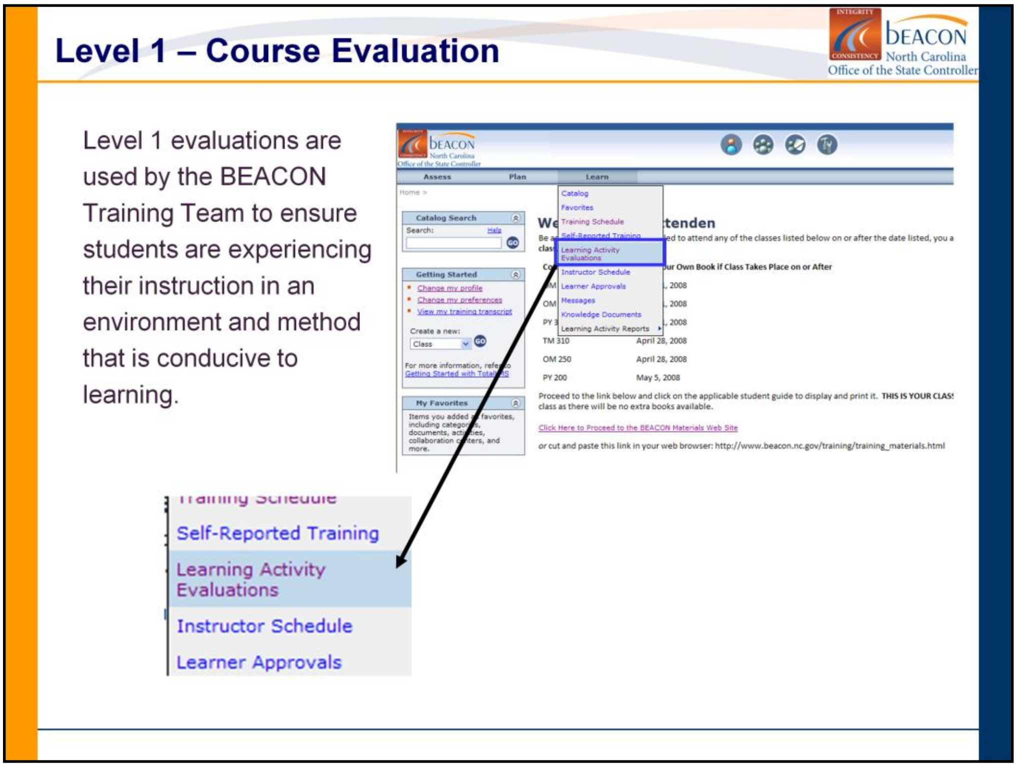
Notes:



Level 1 Evaluations

The Level 1 class evaluation is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

Notes:

Next Steps

- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: http://www.ncosc.net/BEST/
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
  - URL: https://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

Notes:

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.


BEACON
North Carolina
Office of the State Controller
CONGRATULATIONS
You have completed the course
Please complete your course evaluation!

Notes: